

MONTHLY REPORT

FOOD IN FOCUS

Market Analysis Report

October 2025



**Price Control and Commodities
Management Department**



PREFACE

The Department of Price Control and Commodities Management is pleased to present the twelfth 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 has been prepared on the basis of data compiled from multiple credible sources, including the Food and Agriculture Organization (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. The bulletin primarily emphasizes production, supply trends, pricing patterns, imports, exports, international market developments, and local market dynamics, offering valuable insights into the prevailing situation as well as anticipated future trends. A quick overview of report entailing current supply & price situation along with forecast of essential vegetables and pulses is given as under:

- In case of **Tomato**, supply is under acute stress due to local off production season, gradual decrease in domestic supply and instability in import from Afghanistan & Iran. Due to decrease in domestic supply of tomato, reliance on import is increasing, thus tomato price is showing increasing trend in local markets. In order to ensure stable supply of tomato in local markets, uninterrupted import of tomato from Afghanistan and Iran is imperative.
- **Onion** supply is heavily reliant on arrival from Balochistan and Afghanistan. Production season in Khyber Pakhtunkhwa has reached to end. However, due to sufficient arrival of onion from Balochistan, onion supply is stable and prices are comparatively less in contrast with last year prices of correspond month.
- **Potato** has stable supply situation due to its significant local production. Due to availability of sufficient supply, price of potato store is stable and even on lower side as compared to last year. Supply of fresh potato is arriving from KP in very less quantum, resultantly price of potato fresh is comparatively higher in local markets.
- As regards **Pulses**, currently production season of Gram, Mash and Masoor is dormant and their local production also appeared to be far less in contrast with their consumption requirements. Thus, their supply is heavily reliant on import. Fortunately, international prices of pulses have sharply decreased, resultantly import is smooth and prices are showing stable trend in local markets. In case of Gram & Masoor their international prices have declined due to availability of fresh crop from Canada & Australia, thus import is smooth leading to stability in local markets. As regards Moong, its local production is available but 16.8% less as compared to last year production, 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, fresh crop from Afghanistan is available and its international prices are declining, thus its import from Afghanistan may be arranged for its better supply in local markets.

Advisory Measures:

- PAMRA Authority should keep reviewing supplies & prices of essential items in depth on frequent basis and take all preemptive measure to ensure smooth supplies of essential vegetables & pulses by managing supplies either from other provinces or other countries. Future contracts through commission agents/traders may also be ensured to arrange supplies in future.
- As international prices of pulses are showing declining trend, thus it is good opportunity to avail by undertaking maximum import to keep stable supply & price situation of pulses in local markets. Commissioner Faisalabad with help of importers of pulses may expedite pulses import as per consumption requirement. District Administration & EADAs (E&M) in Punjab should consider decline in international prices while fixing pulses prices in District Price Control Committee (DPCC) meetings.
- Agriculture Department should prioritize domestic production of essential agricultural commodities by expanding cultivated area and introducing high yielding and climate resistant seed varieties.

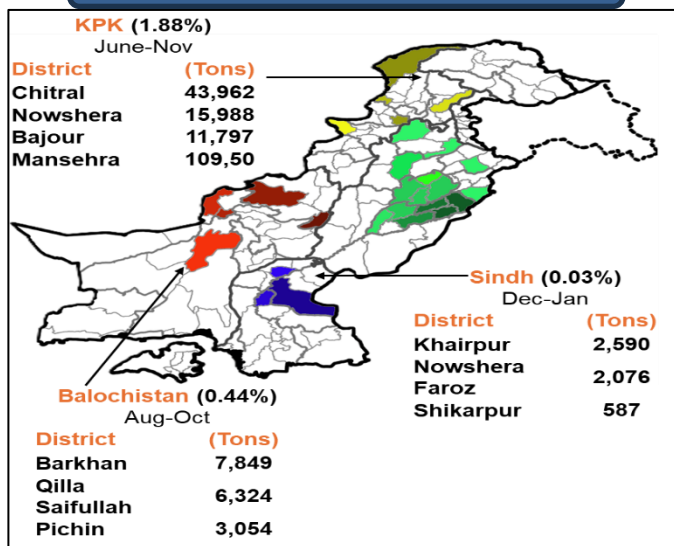
1. Potato



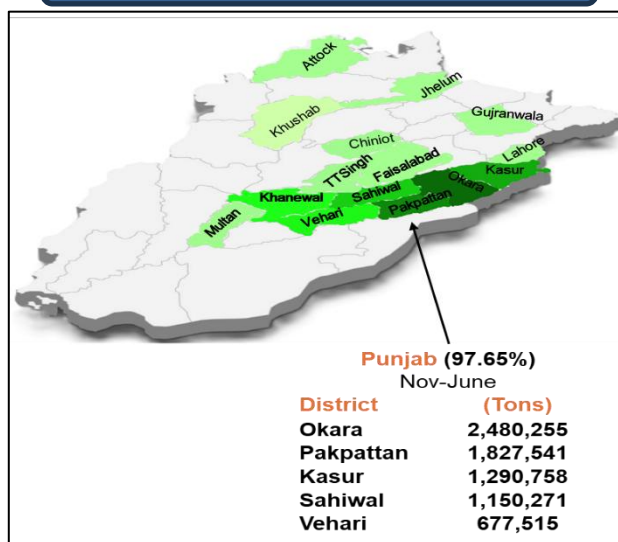
NATINAL OVERVIEW

- Pakistan being surplus in potato production can easily meet its domestic consumption requirement and this surplus production also helps in country to earn foreign exchange reserve through export.
- Punjab is highest potato producing province having 98% share in domestic production. To take a holistic view, major producing districts of potato in all provinces of the country have been mapped out as under:

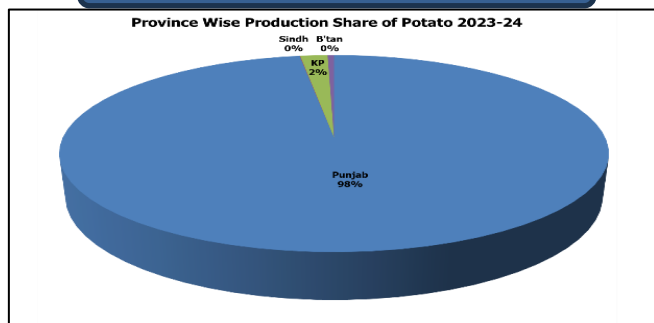
Major Producing Districts of Potato in Pakistan



Major Producing Districts of Potato in Punjab



Province Wise Production Share of Potato



Key indicators

- **Punjab Production** = 98,12,923 tons,
- **Punjab Cons. Requirement** = 19,45,979 tons,
- **Punjab Surplus** = 78,66,944 tons, **Pakistan Production** = 1,00,10,773 tons,
- **Pakistan Cons. Requirement** = 36,80,451 tons,
- **Pak Surplus** = -63,30,322 tons.
- **Export (2024-25)** = 8,68,605 tons,
- **Countries** = UAE, Sri Lanka & Afghanistan,

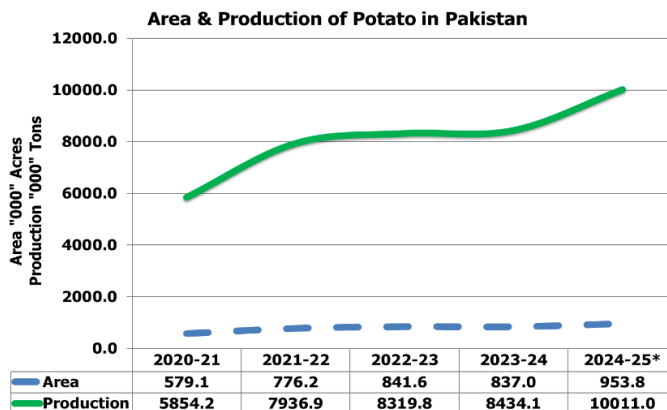


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Domestic Area & Production:

- Agricultural Statistics of Pakistan and Economic Survey of Pakistan 2024-25 highlighted that during year 2024-25, estimated domestic production of potato has been recorded at 10.011 million tons, depicting a record-high output (18.70% increase over the previous year).
- The cultivated area and production of potato have been showing increasing trend over the last five years, which significantly contributes in agricultural economy of the country.



*=Provisional

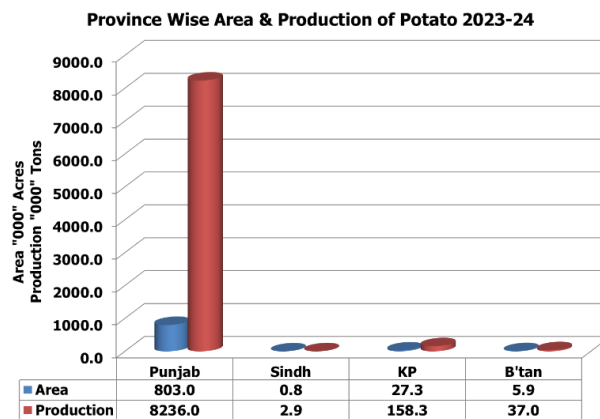
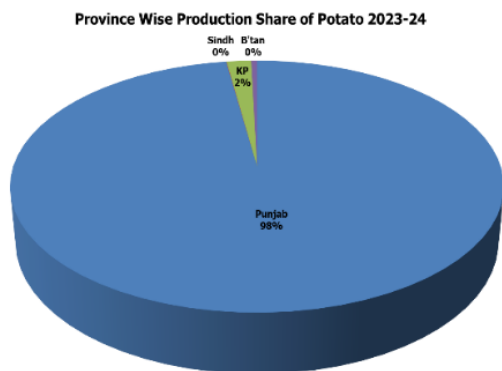
Source: Agricultural Statistics of Pakistan & Economics Survey of Pakistan 2024-25

Production & Consumption:

- Domestic consumption requirement of potato is estimated at 3,680,451 tons according to the Household Integrated Economic Survey 2018–19 conducted by the Pakistan Bureau of Statistics and published in the Agricultural Statistics of Pakistan
- As Pakistan's potato production is estimated to be 10,010,773 tons during year 2024-25, which is far higher than domestic consumption requirement, resulting in surplus production of 36,80,451 tons.

Province wise Area & production:

- Having 98% share in domestic production, Punjab appears as major potato producing province in the country. Remaining provinces have minimal share in domestic production.
- During 2023–24, potato production in Punjab recorded at 8.236 million tons on cultivated area of 8,03,000 acres. KP achieved 1,58,300 tons, whereas Balochistan & Sindh attained production of 37000 tons & 2900 tons, respectively.



Source: Agricultural Statistics of Pakistan

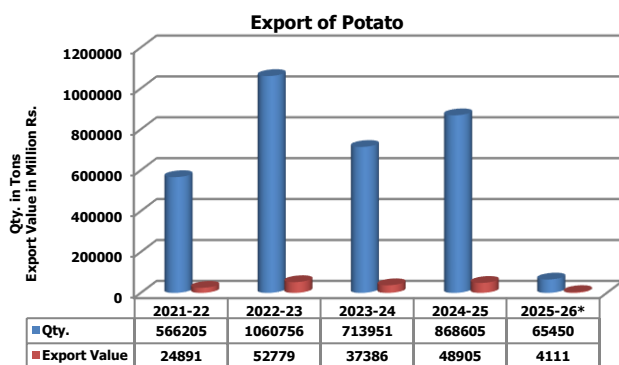


Price Control & Commodities Management Department



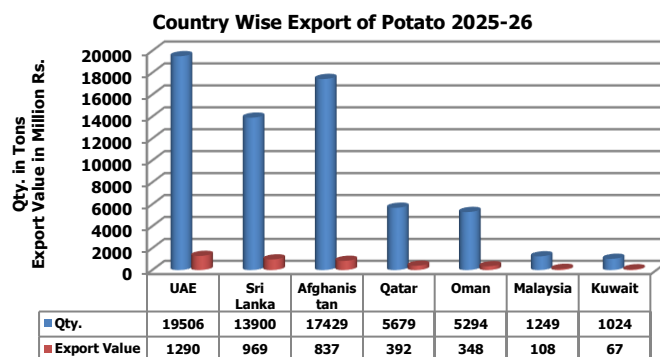
Export Insights:

- Benefiting from surplus production, Pakistan has emerged as a prominent global exporter of potato. In the fiscal year 2024–25, the country exported 868,605 tons, generating export revenues of Rs. 48,905 million. In July of 2025–26 (July-August), exports were recorded at 65,450 tons, contributing Rs.4,111 million in earning through export. Key export destinations include U.A.E, Sri Lanka, Afghanistan, Qatar, Oman, Malaysia & Kuwait.



*=Export during July 2025 to August 2025

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

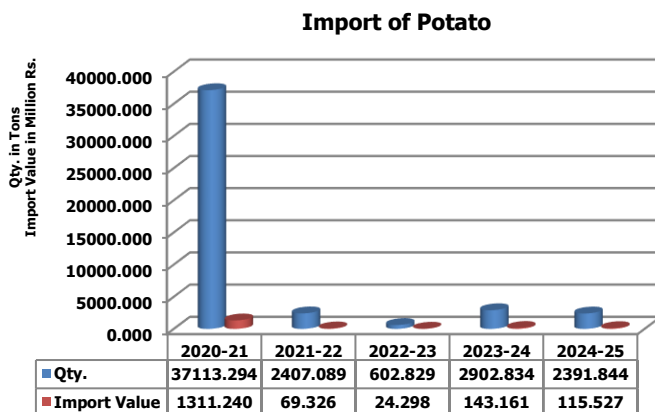


*=Export during July 2025 to August 2025

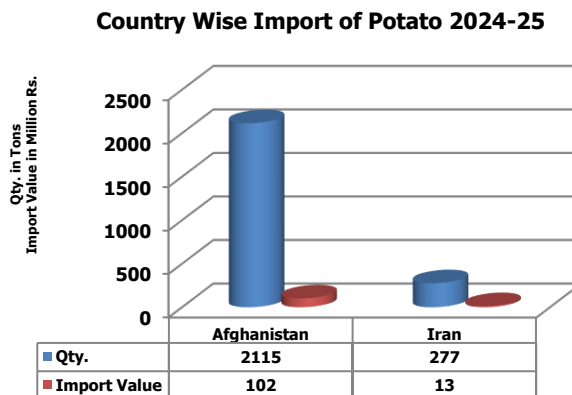
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

Import Insights:

- Given the sufficiency of domestic production, Pakistan has no need to import potato for consumption. However, a small quantity is imported exclusively for seed purpose only. During year 2024–25, imports were recorded at 2,392 tons, while no imports were reported in year 2025–26 (July to August). The primary sources of these seed imports are Afghanistan and Iran.



Source: PBS & Pakistan Single Window



Source: Pakistan Single Window



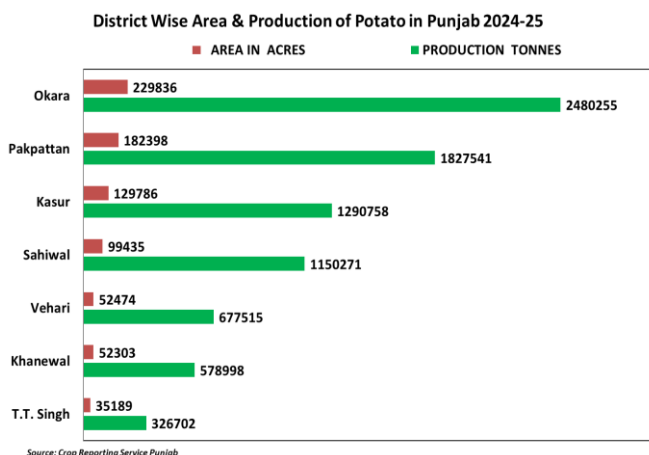
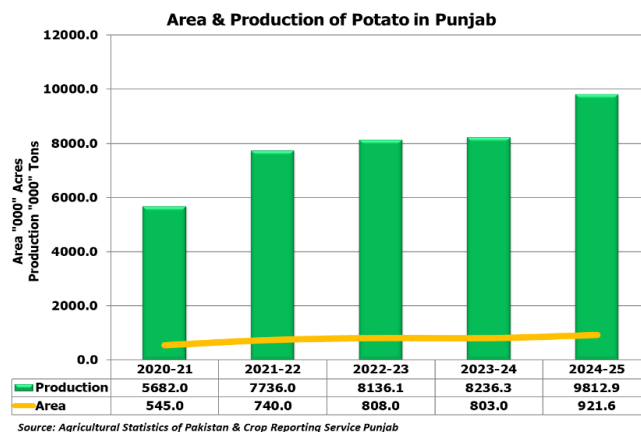
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PROVINCIAL OVERVIEW

Area & Production:

- Punjab occupies a dominant position in Pakistan's potato production, contributing 98% of the national output. The Punjab province not only meets its own consumption needs but also serves the country's overall demand.
- Over the past five years, potato production in Punjab has shown consistent growth, rising by 72.7% in year 2024–25 compared to the output recorded in year 2020–21. Similarly, the cultivated area expanded by 69.1% during the same period.
- In Punjab, Okara district appears to be major producer of potato attaining production of 2.480 million tons. Other districts Pakpattan, Kasur, Sahiwal, Vehari, Khanewal and Toba Tek Singh also appear as major contributing districts following district Okara.



Supply Cycle:

- Seasonal variations give rise to 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

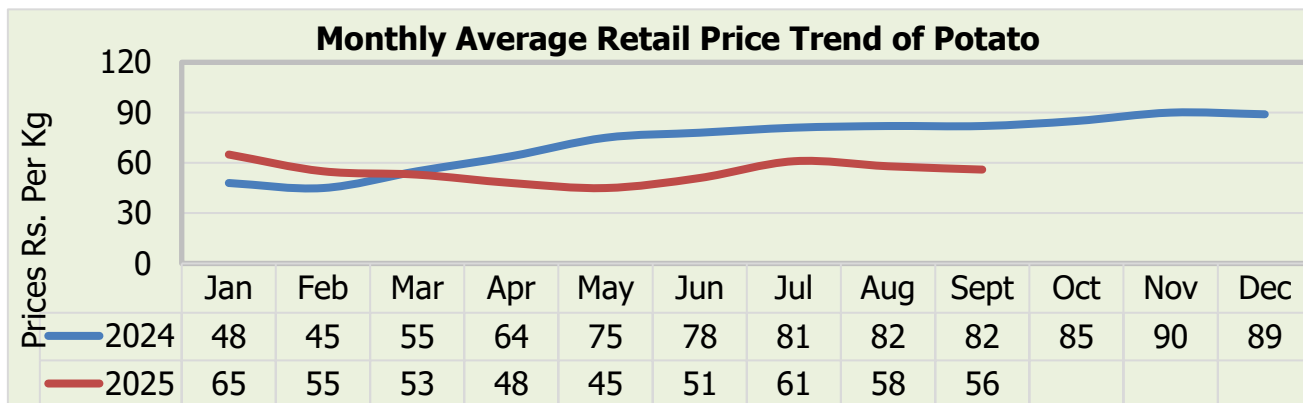


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Retail Market Prices:

- As a result of significant production, sufficient supply of potato is available from local cold storages. Thus, its supply is stable and prices are on lower side as compared to 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 September is Rs.56/Kg in local markets.



SUPPLY MANAGEMENT ADVISORY



Assessment

Punjab achieved record production of potato i.e. 9.813 million tons during year 2024-25, showing 19.14% increase in contrast with last year production of 8.236 million tons. This significant increase has contributed to maintain stability in market supply. Thus, sufficient supply of potato is available from local cold storages and price is less in contrast with last year. However, the supply of fresh potato is arriving in limited quantity from Khyber Pakhtunkhwa, resultantly price of fresh potato is relatively higher.

Forecast

Potato supply is likely to remain stable till November-2025 due to sufficient arrival from local cold stores, potato price is stable and comparatively less than last year prices. However, next local production season of potato is likely to start during November-2025, afterwards supply will further improve and prices are expected to decline in local markets.





Price Control & Commodities Management Department



Advisory



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



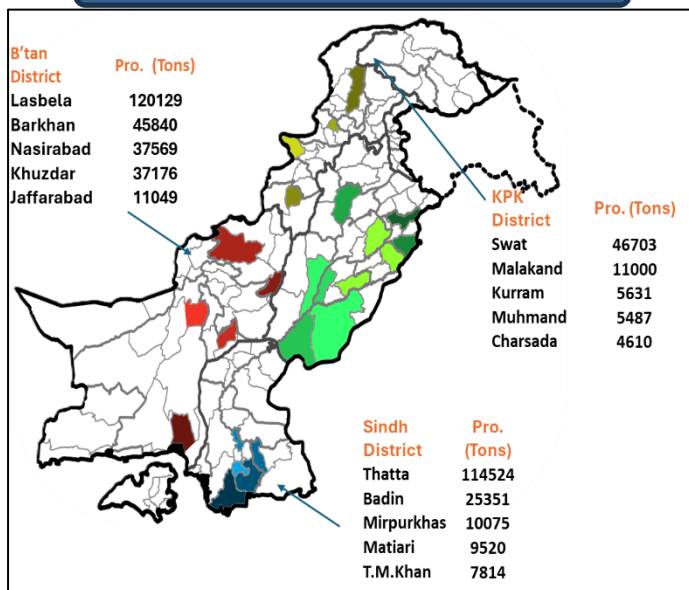
2. TOMATO



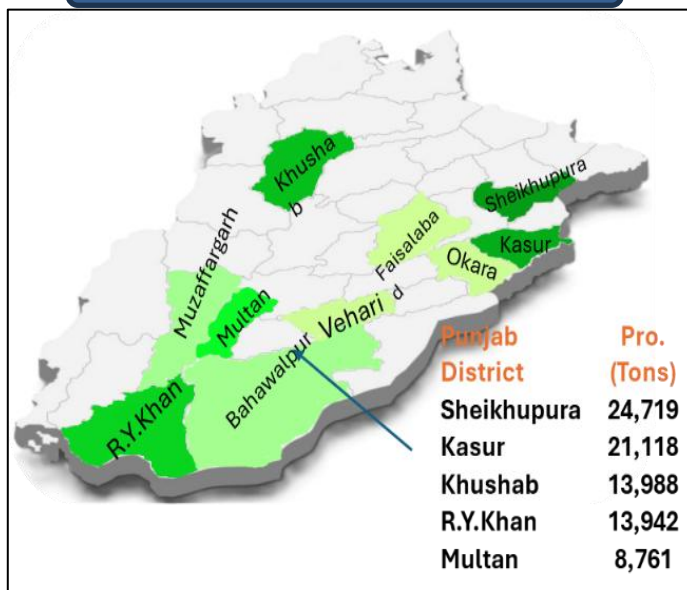
NATIONAL OVERVIEW

- In Pakistan, tomato is mainly produced in Balochistan with its 47% share in total domestic production. While, Sindh, Punjab and KP have their production share 24%, 16% and 13%, respectively.
- In order to assess domestic supply of tomato, major producing districts of tomato in all provinces of the country have been mapped out as under:

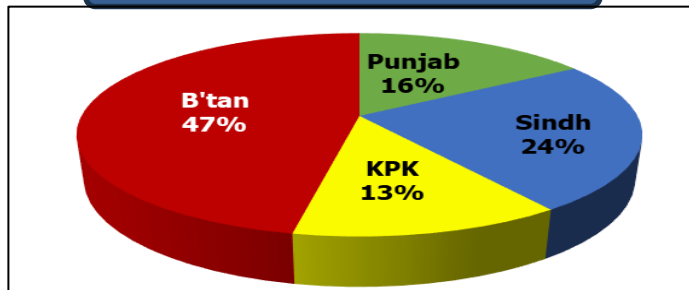
Major Producing Districts of Tomato in Pakistan



Major Producing Districts of Tomato in Punjab



Province Wise Production Share of Tomato



Key indicators

- Punjab Production = 2,04,024 tons
- Punjab Cons. Requirement = 7,81,456 tons
- Punjab Deficit = -5,77,432 tons
- Pakistan Production = 8,72,825 tons
- Pakistan Cons. Requirement = 14,77,977 tons
- Pak Deficit = -6,05,152 tons.
- Import (2024-25) = 3,76,702 tons

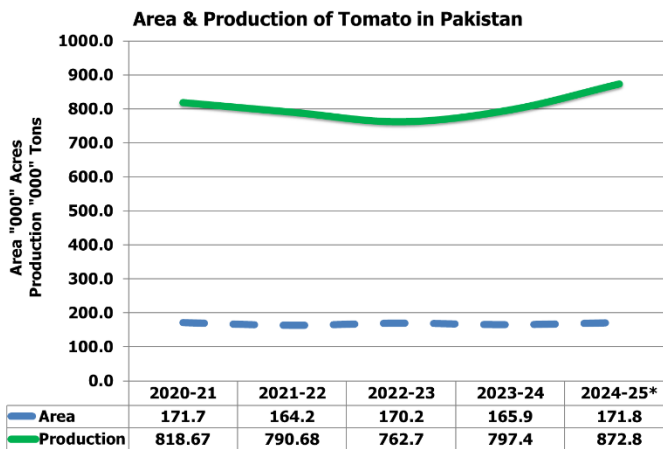


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Domestic Area & Production:

- Over the past three years, tomato production in the country is showing gradually increasing trend. However, cultivated area is almost stable with slight variation.
- During year 2024-25, estimated domestic production of tomato is 872,825 tons, reflecting a 9.45% increase compared to the previous year. The cultivated area expanded to 171,800 acres, marking a 3.5% rise over the preceding year.



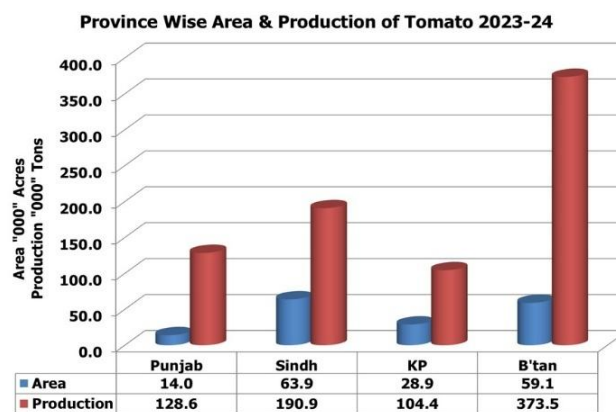
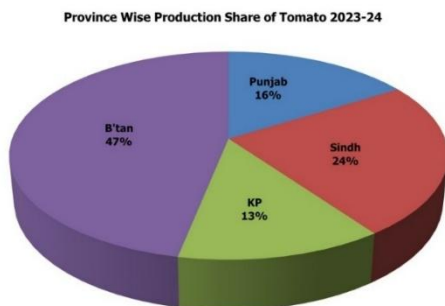
Source: Agricultural Statistics of Pakistan & Economics Survey of Pakistan 2024-25

Production & Consumption:

- Although domestic tomato production has shown a slight increase, it still falls considerably short of meeting national consumption needs. Domestic demand is estimated at 1,477,977 tons, while production stands at only 872,825 tons, resulting in a deficit of 605,152 tons. This shortfall necessitates reliance on imports to ensure market stability.

Province wise Area & Production:

- Balochistan stands as the leading tomato-producing province, accounting for 47% of the national production, followed by Sindh with 24%, Punjab with 16%, and Khyber Pakhtunkhwa contributing the remaining 13%.
- Balochistan ranked first in tomato production, producing 373,500 tons from 59,100 acres during year 2023-24. Sindh followed with 190,900 tons harvested from 63,900 acres. Punjab contributed 128,600 tons from 14,000 acres, while Khyber Pakhtunkhwa recorded the lowest output among provinces, producing 104,400 tons from 28,900 acres.



Source: Agricultural Statistics of Pakistan

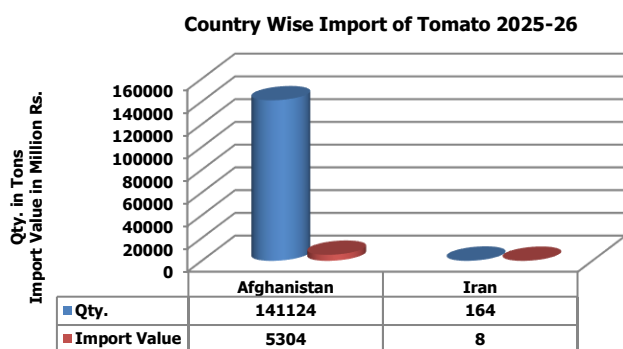


Price Control & Commodities Management Department



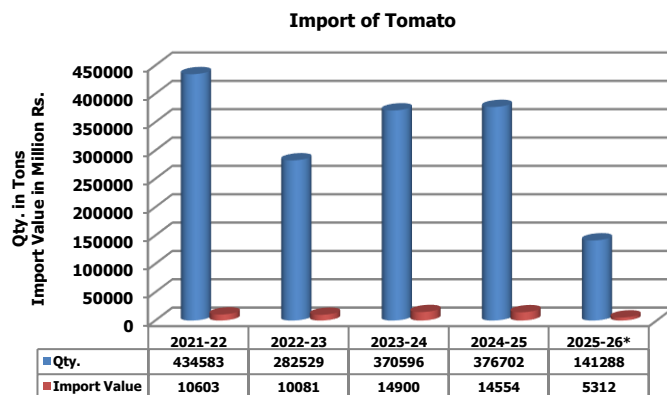
Import Insights:

- During year 2024-25, Pakistan imported 3,76,702 tons of tomato at a cost of Rs. 14,554 million, which is slightly higher as compared to last year in terms of quantum. While during year 2025-26(July-August), tomato import has been recorded at 1,41,288 tons, valued at Rs. 5,312 million.
- Pakistan imports tomato mainly from Afghanistan and Iran. During year 2025-26 (July-August), tomato import from Afghanistan recorded at 1,41,124 tons valued at Rs. 5304 million, while Iran supplied only 164 tons worth Rs. 8.00 million.



*=Import during July 2025 to August 2025

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

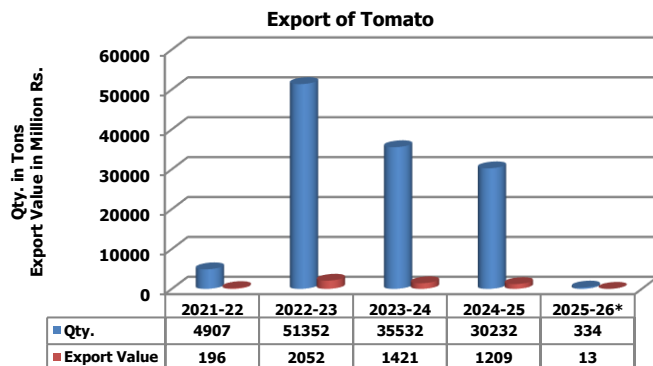


*=Import during July 2025 to August 2025

Source: PBS & Pakistan Single Window

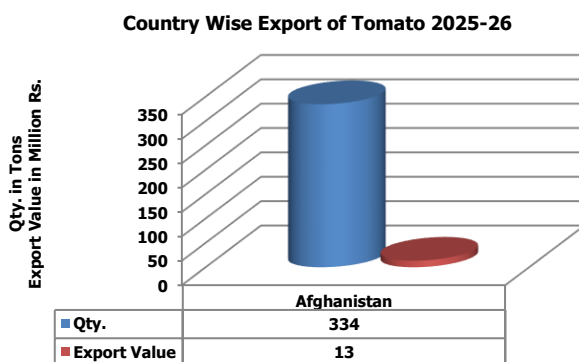
Export Insight:

- Notably, despite heavy reliance on imports to meet domestic demand, Pakistan also exports tomato to other countries, thereby contributing to foreign exchange earnings.
- On the export side, Pakistan exported 30,232 tons of tomato during year 2024-25, generating export earnings of Rs. 1,209 million, which is comparatively less than last year in terms of both quantum and value. During year 2025-26 (July-August), exports stood at only 334 tons, generating Rs. 13 million. Tomato exports are mainly destined to Afghanistan.



*=Export during July 2025 to August 2025

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



*=Export during July 2025 to August 2025

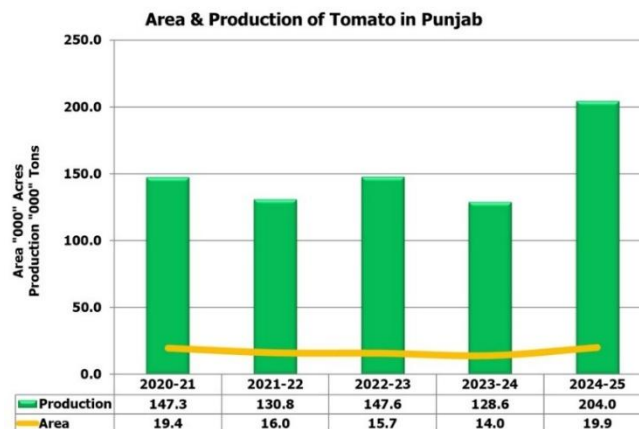
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)



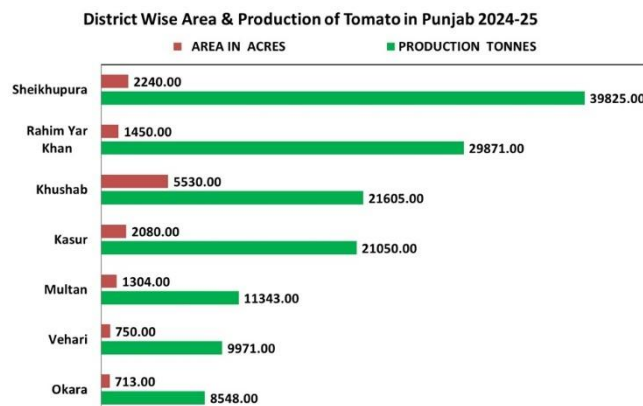
PROVINCIAL OVERVIEW

Area & Production:

- An in-depth review of tomato production in Punjab highlights significant fluctuations in both output and cultivated area over the past five years.
- During year 2024-25, tomato production in Punjab has been recorded at 204,000 tons, showing 58.6% increase in contrast with last year. Similarly, the cultivated area expanded to 19,900 acres, marking a 42.14% rise over last year.
- In Punjab, the major tomato-producing districts include Sheikhupura, Rahim Yar Khan, Khushab, Kasur, Multan, Vehari and Okara.
- Among them, Sheikhupura ranks first with production of 39,825 tons, Rahim Yar Khan ranks 2nd with 29,871 tons and Khushab ranks 3rd with 21,605 tons.



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



Source: Crop Reporting Service Punjab

Supply Cycle:

- Due to seasonal variations, tomato supply is available from different provinces at various times 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, Kasur, Khushab, Rahim Yar Khan, Multan, Muzaffargarh, Bahawalpur 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

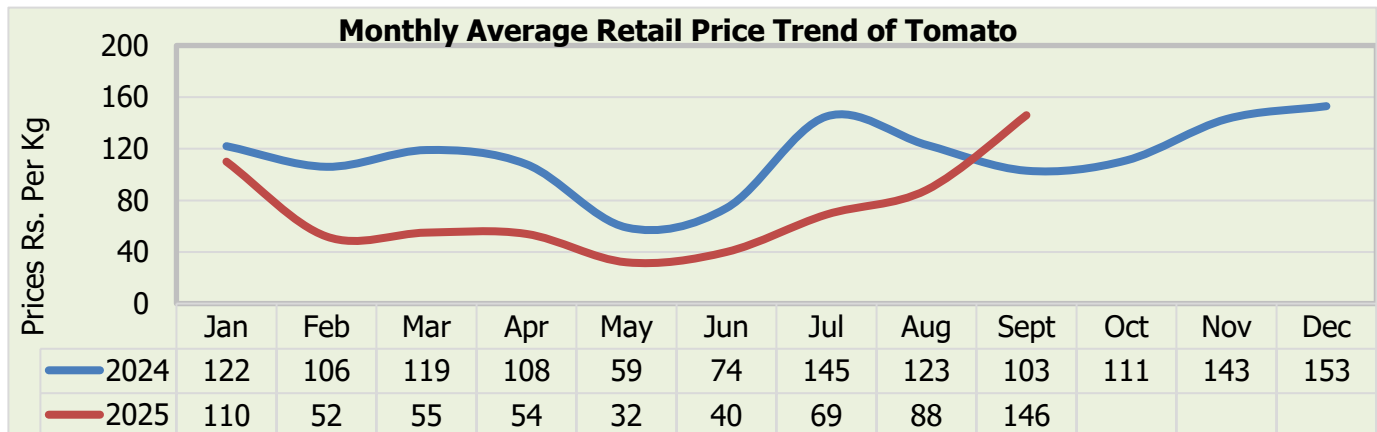


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Retail Market Price:

- Currently, off production season is prevailing in Punjab and tomato supply is mainly reliant on arrival from Balochistan as well as import from Afghanistan & Iran. Thus, tomato supply is under stress and price is showing increasing trend in local markets. Monthly average retail price of tomato in Punjab is Rs.146 per Kg during month of September.



SUPPLY MANAGEMENT ADVISORY



Assessment

Major supply of tomato is dependent on arrival from Balochistan, KP and import from Afghanistan & Iran. Domestic supply of tomato from Balochistan & KP is gradually decreasing, therefore reliance on import is increasing. Resultantly, tomato supply is under stress and its prices are trending on higher side.

Forecast

The prevailing stress supply is likely to persist till December-2025 and tomato prices are expected to remain on higher side. Smooth import from Afghanistan & Iran is imperative to ensure tomato supply at affordable rates. However, Sindh crop of tomato will start to arrive during December-2025, afterwards supply & price situation of tomato is likely to come in normal range, subject to no severe effects on Sindh crops by recent rainfalls and floods.





Price Control & Commodities Management Department



Advisory



- PAMRA Authority may ensure through Secretaries Market Committees;
 - Smooth supply from Balochistan, KP, Afghanistan & Iran with the help of commission agents
 - Strict auction monitoring
 - Fair & transparent price fixation to pass relief to common man.
- The District Administration, with the help of Price Control Magistrates, should prevent overcharging through regular inspections of retailers.
- It is reiterated that Ministry of National Food Security & Research may ensure smooth clearance of tomato from Pak-Afghan borders i.e. Torkham, Chaman, Angoor Adda.



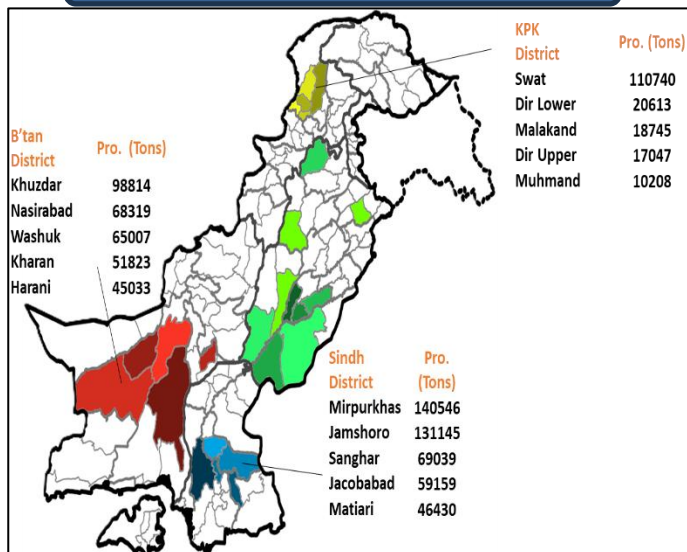
3. ONION



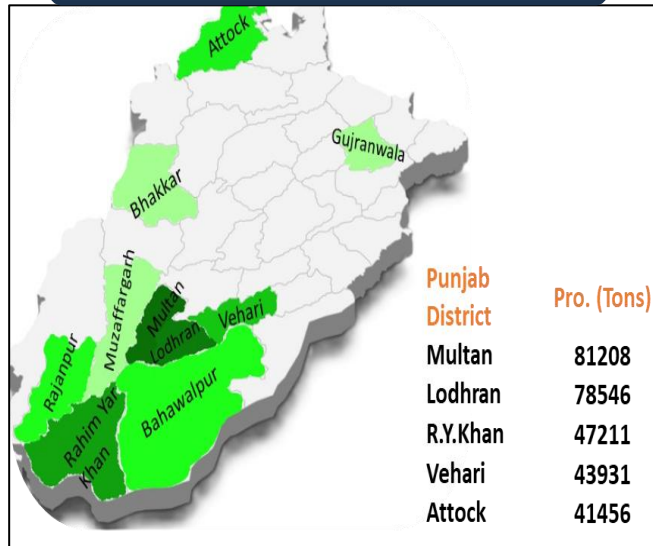
NATIONAL OVERVIEW

- In Pakistan, onion is mainly produced in Balochistan with its 37% share in total domestic production. While, Sindh, Punjab and KP have their production share 33%, 21% and 9%, respectively.
- Major producing districts of onion in all provinces of the country have been mapped out as under:

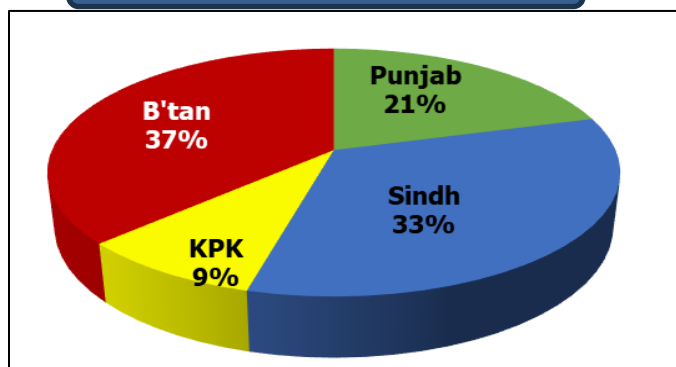
Major Producing Districts of Onion in Pakistan



Major Producing Districts of Onion in Punjab



Province Wise Production Share of Onion



Key indicators

- **Punjab Production** = 9,14,008 tons
- **Punjab Cons. Requirement** = 14,55,654 tons,
- **Punjab Deficit** = -5,41,646 tons,
- **Pakistan Production** = 26,70,000 tons,
- **Pakistan Cons. Requirement** = 27,53,094 tons,
- **Pak Deficit** = -83,094 tons.
- **Import (2024-25)** = 3,70,689 tons,
- **Export (2024-25)** = 2,65,318 tons,

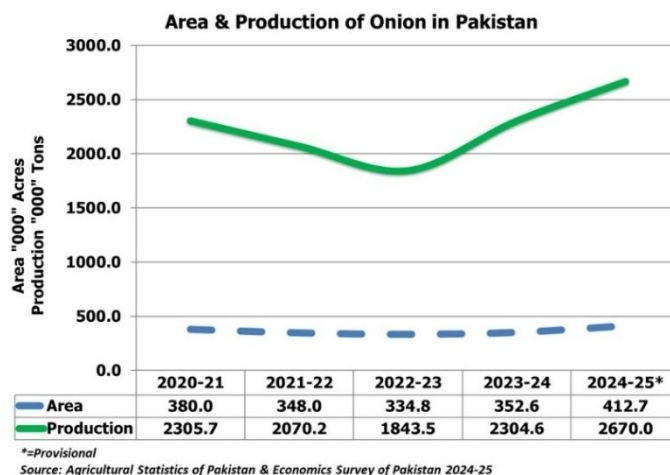


Price Control & Commodities Management Department



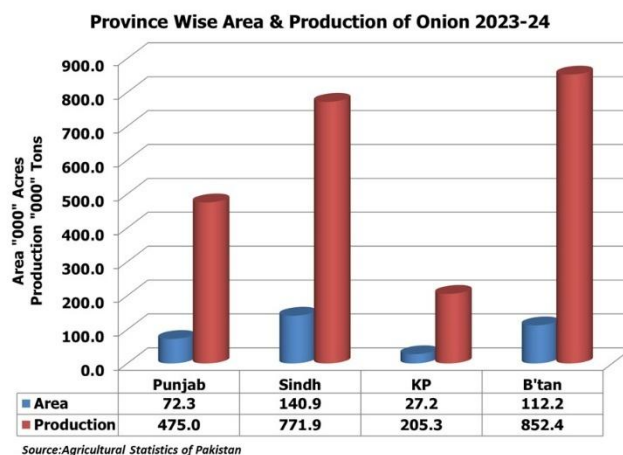
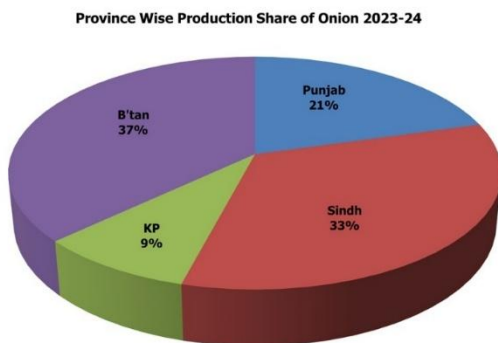
Domestic Area & Production:

- As regards onion, domestic production and the area under cultivation in Pakistan have been increasing since last three years.
- During the fiscal year 2024–25, estimated domestic onion production reached 2.670 million tons—reflecting a 15.8% increase over the previous year.
- During the same period, the cultivated area expanded to 412,700 acres, marking a 17.04% year-on-year increase.



Province wise Area & Production:

- Balochistan remains the largest contributor to Pakistan's onion production, providing 37% of the national output, followed by Sindh with 33%.
- Punjab ranks third with a 21% share, while Khyber Pakhtunkhwa (KP) accounts for the smallest contribution, producing just 9% of the country's overall onion yield
- During year 2023–24, Balochistan led onion production with 852,400 tons harvested from 112,200 acres. Sindh stood at 2nd rank, by producing 771,900 tons across 140,900 acres.
- Whereas, Punjab contributed 474,600 tons from 72,300 acres and Khyber Pakhtunkhwa (KP) recorded the lowest share, with 205,300 tons cultivated over 27,200 acres.



Production and Consumption:

- As a result of limited domestic production, Pakistan depends on onion imports to meet its national consumption demand. Local production was estimated at 2,670,000 tons, against a consumption requirement of 2,753,094 tons, leading to a supply gap of 83,094 tons.



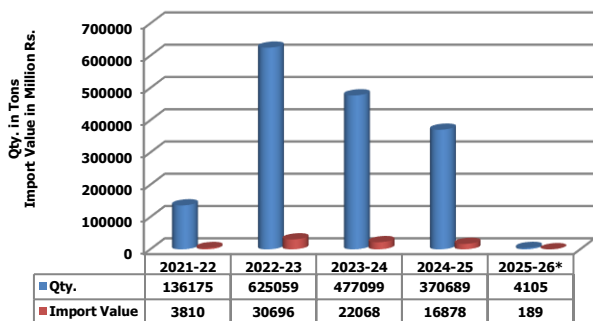
Price Control & Commodities Management Department



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-August), imports stood at only 4105 tons, incurring an expenditure of Rs. 189 million. Pakistan arranges onion imports primarily from Afghanistan.

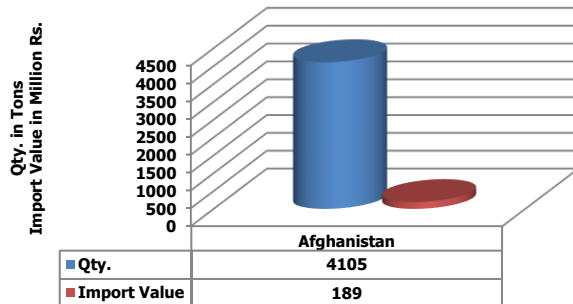
Import of Onion



*=Import during July 2025 to August 2025

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

Country Wise Import of Onion 2025-26



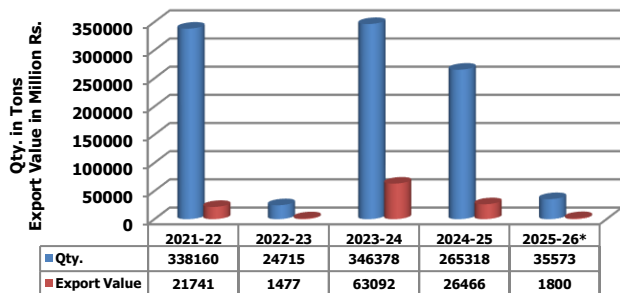
*=Import during July 2025 to August 2025

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

Export Insights:

- To bolster its foreign exchange reserves, Pakistan also exports onions to various international markets.
- In the fiscal year 2024–25, onion exports was recorded at 265,318 tons, generating Rs. 26,466 million in revenue, which was lower than the previous year in terms of both volume and value.
- During year 2025–26(July-August), export volumes stood at 35,573 tons, yielding Rs. 1,800 million.
- Major export destinations include Malaysia, United Arab Emirates (UAE), Sri Lanka, Oman, Singapore, Qatar and Bahrain.
- Export volumes to Malaysia, UAE and Sri Lanka are particularly substantial, underscoring strong demand for Pakistani onions in these high-end markets.

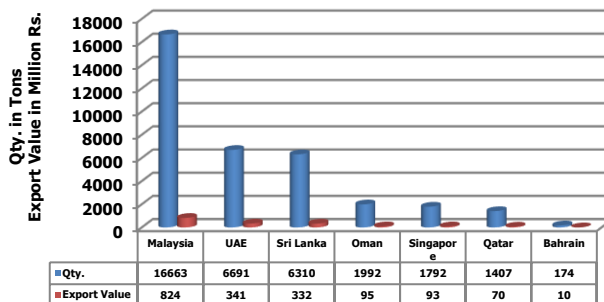
Export of Onion



*=Export during July 2025 to August 2025

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

Country Wise Export of Onion 2025-26



*=Export during July 2025 to August 2025

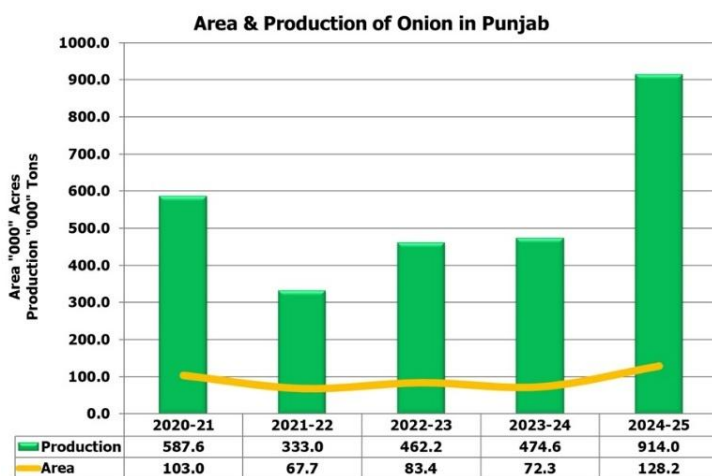
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)



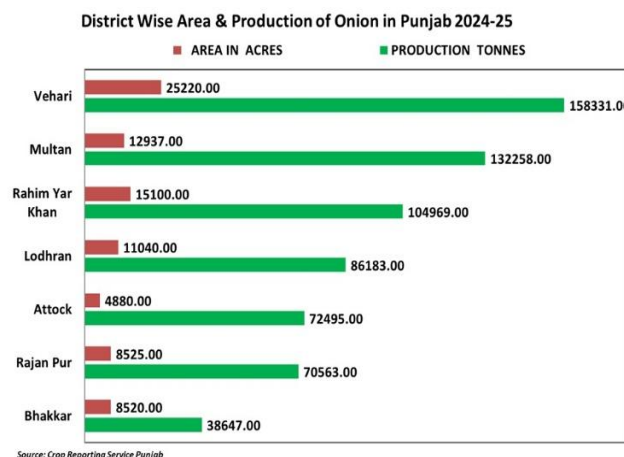
PROVINCIAL OVERVIEW

Area & Production:

- Onion production in Punjab has been showing increasing trend over last three years. However, during year 2024-25 onion production has been recorded at 9,14,000 tons indicating 92.5% higher over the last year. Likewise, cultivated area also reached to 1,28,200 acres depicting 77.3% increase over the last year.
- Leading onion producing districts in Punjab are Vehari, Multan, Rahim Yar Khan, Lodhran, Attock, Rajanpur and Bhakkar.
- Vehari stands at 1st rank by securing onion production of 1,58,331 tons, Multan ranks 2nd with 1,32,258 tons and R.Y.Khan ranks 3rd having production of 1,04,969 tons.



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



Source: Crop Reporting Service Punjab

Supply Cycle:

- The supply of onion across Pakistan 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	Multan, Lodhran, Rahim Yar Khan, Vehari, Attock, Rajan Pur & Bahawalpur 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

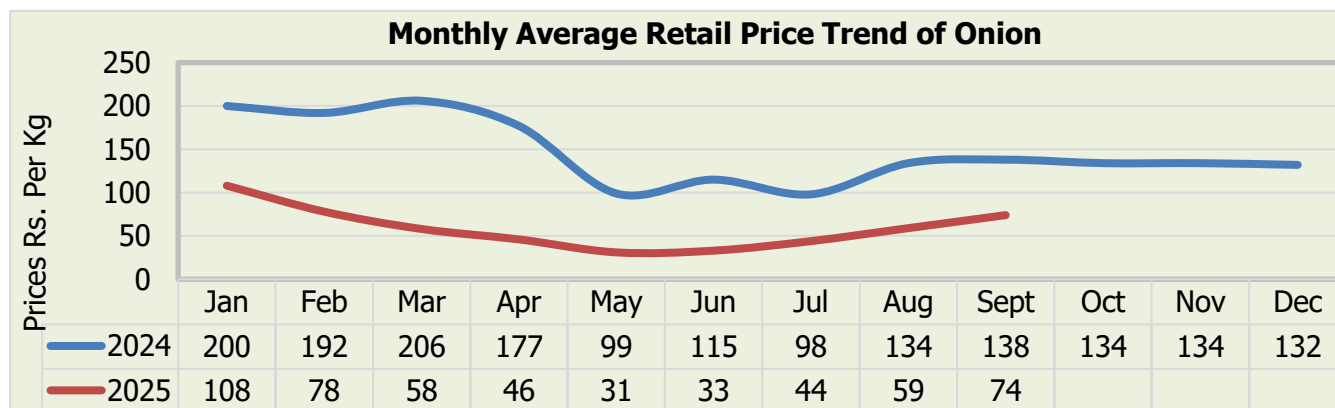


Price Control & Commodities Management Department



Market Prices:

- Onion supply is mainly dependent on arrival from Balochistan and Afghanistan. Supply is stable and prices are increasing however still less as compared to last year prices. The graphical trend of monthly average retail price of onion in Punjab is given as under:



SUPPLY MANAGEMENT ADVISORY



Assessment

Due to local off production season, onion supply is being arranged from Balochistan, KP along with import from Afghanistan. Production season of onion in KP has reached to end. However, sufficient arrival is available from Balochistan which is supplemented by supply from Afghanistan. Resultantly, supply situation of onion is experiencing stable trend and its price on lower side as compared to last year prices.

Forecast

Production season of onion in KP has finished, whereas production season in Balochistan will sustain till November-2025 and supply from Afghanistan will also remain available in the local markets. Thus, supply of onion is likely to remain stable till November-2025. During November-2025, Sindh crop will start to arrive which will improve supply situation and prices are expected to remain stable in local markets.





Advisory

Price Control & Commodities Management Department



- PAMRA Authority with the help of concerned Secretaries Market Committees, should keep close liaison with commission agents to ensure sufficient supplies of onion from Balochistan and import from Afghanistan to ensure stable supply in local markets.
- PAMRA Authority should strictly enforce transparent and fair price fixation process through regular monitoring of auction proceedings by Market Committees in Agricultural Produce Markets on daily basis.
- The District Administration with the help of Price Control Magistrates may take strict action against retailers involved in over charging to ensure true implementation of retail notified rates.

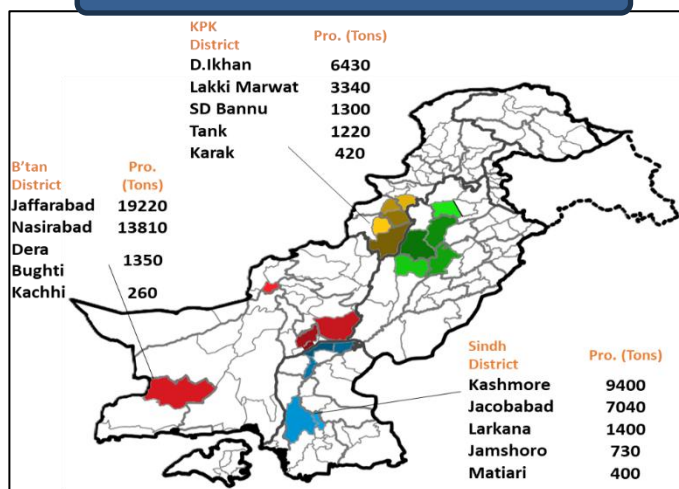
4. GRAM (Chickpea)



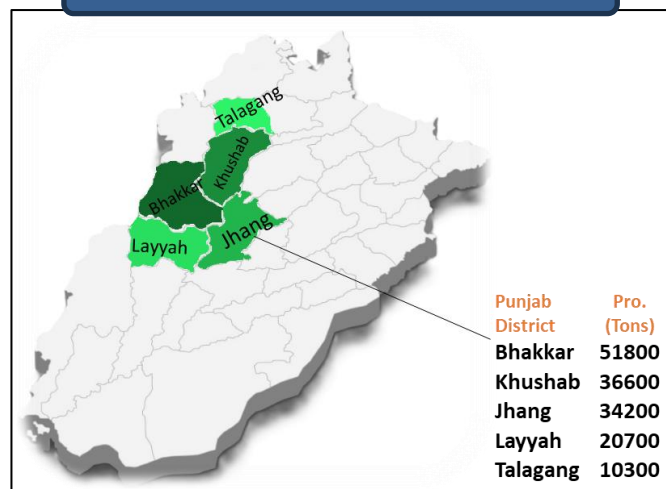
NATIONAL OVERVIEW

- Pakistan is not self sufficient to meet domestic consumption requirements of Gram. In the country, Gram is mainly produced in Punjab with its 66% share in total domestic production. While, production shares of Balochistan, Sindh and KP are 18%, 10% and 6%, respectively.
- Major producing districts of gram in all provinces of the country have been mapped out as under:

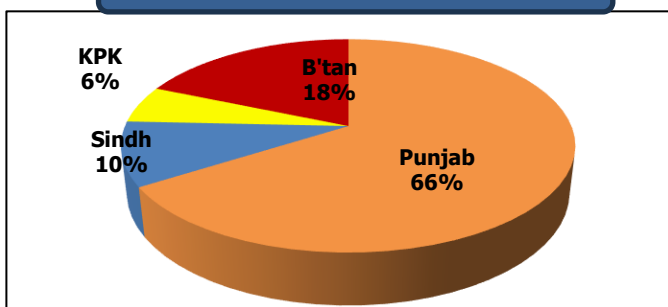
Major Producing Districts of Gram in Pakistan



Major Producing Districts of Gram in Punjab



Province Wise Production Share of Gram



Key indicators

- **Punjab Production** = 98,000 tons,
- **Punjab Cons. Requirement** = 1,99,195 tons,
- **Punjab Deficit** = -1,01,195 tons,
- **Pakistan Production** = 1,75,000 tons,
- **Pakistan Cons. Requirement** = 3,76,739 tons,
- **Pak Deficit** = -2,01,739 tons.
- **Import (2024-25)** = 1,12,047 tons,
- **Countries** = Australia, Russia & Canada

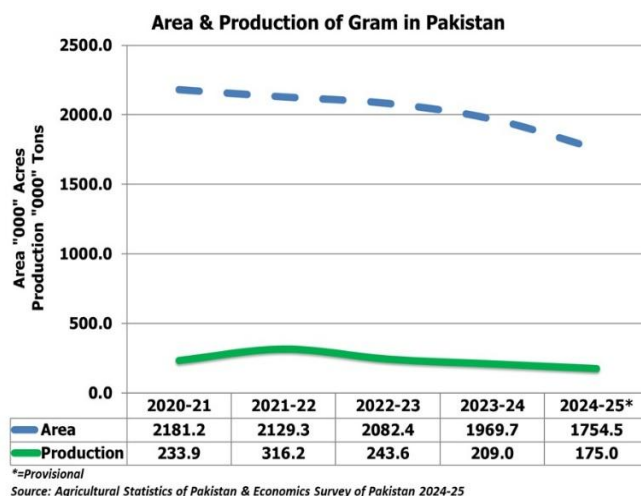


Price Control & Commodities Management Department



Domestic Area & Production:

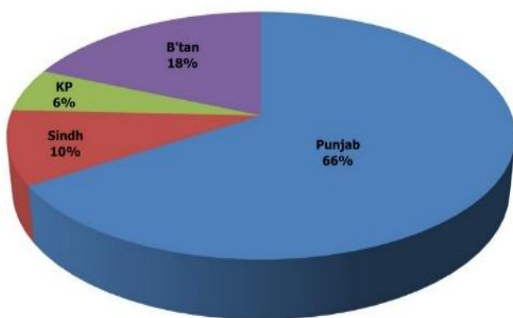
- During period from year 2021-22 to year 2024-25, domestic area and production of Gram have been on decline as per Agricultural Statistics of Pakistan and Economic Survey of Pakistan.
- During year 2024-25, domestic production of gram was recorded at 175,000 tons, representing a decline of 16 percent from the preceding year and 25.18 percent compared to 2020-21. This reduction in production has widened the supply deficit, thereby necessitating imports to fulfill national consumption needs.



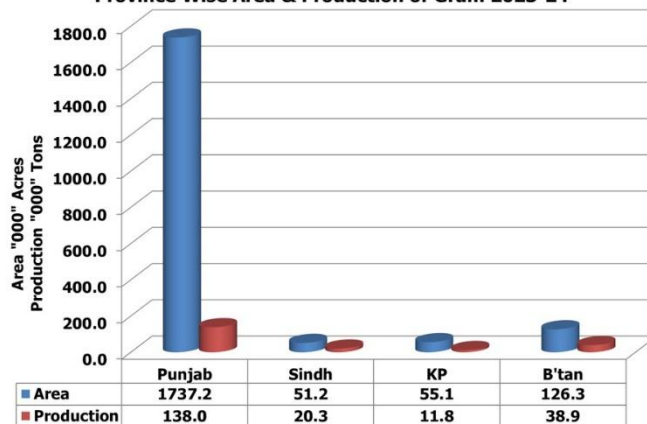
Province wise Area & Production:

- Punjab plays a central role in gram production, accounting for 66 % of the national output. It is followed by Balochistan with 18 %, Sindh with 10 %, and Khyber Pakhtunkhwa (KP) with 6 %.
- Punjab remains the leading province in gram production. In year 2023-24, its output was recorded at 138,000 tons, cultivated over 1,737,200 acres. In comparison, production in Balochistan, Sindh, and Khyber Pakhtunkhwa was 38,900 tons, 20,300 tons, and 11,800 tons, respectively.

Province Wise Production Share of Gram 2023-24



Province Wise Area & Production of Gram 2023-24



Production and Consumption:

- Due to insufficient domestic production, Pakistan continues to rely on gram imports to meet local demand. In year 2024-25, domestic production was estimated at 175,000 tons against a consumption requirement of 376,739 tons, highlighting a supply deficit of 201,739 tons.

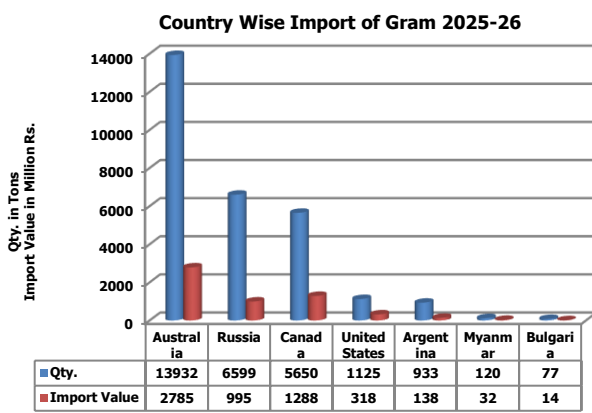


Price Control & Commodities Management Department



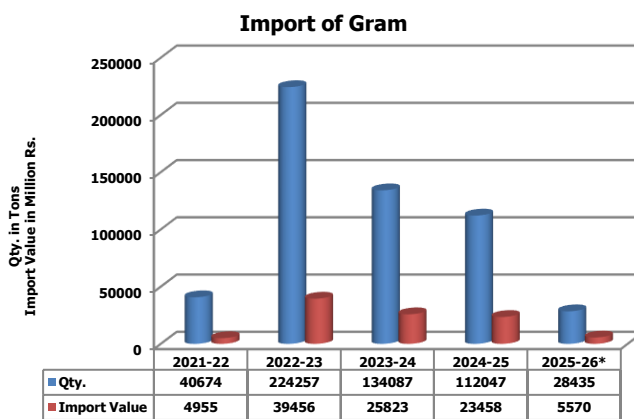
Import Insights:

- In year 2024-25, Pakistan imported 112,047 tons of gram at a total cost of Rs. 23,458 million. During year 2025-26(July-August), imports stood at 28,435 tons, amounting to Rs. 5,570 million.
- Pakistan primarily sources gram imports from Australia, Russia, Canada, United States, Argentina, Myanmar and Bulgaria. The bulk of imports are arriving from Australia, Russia, Canada, while contributions from the other countries remain comparatively modest in both volume and value.



*=Import during July 2025 to August 2025

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



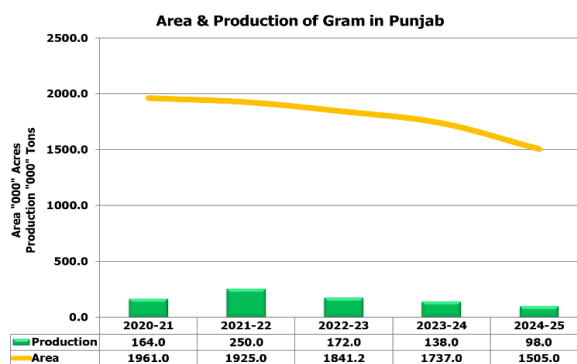
*=Import during July 2025 to August 2025

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

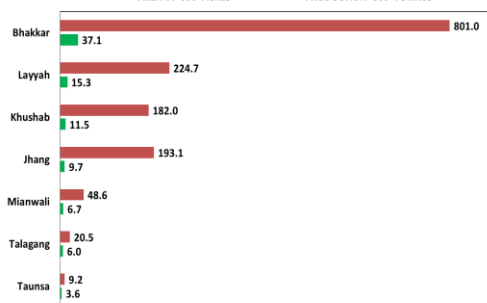
PROVINCIAL OVERVIEW

Area & Production:

- Gram production in Punjab remains unsatisfactory, as both cultivated area and production have shown a consistent downward trend over time. In year 2024-25, production was recorded at 98,000 tons, reflecting a sharp decline of 28.98 percent compared to the previous year. Likewise, cultivated area also declined to 15,05,000 acres showing 13.35% decrease over the last year. This significant fall in production of gram raises 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



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



Source: Crop Reporting Service Punjab

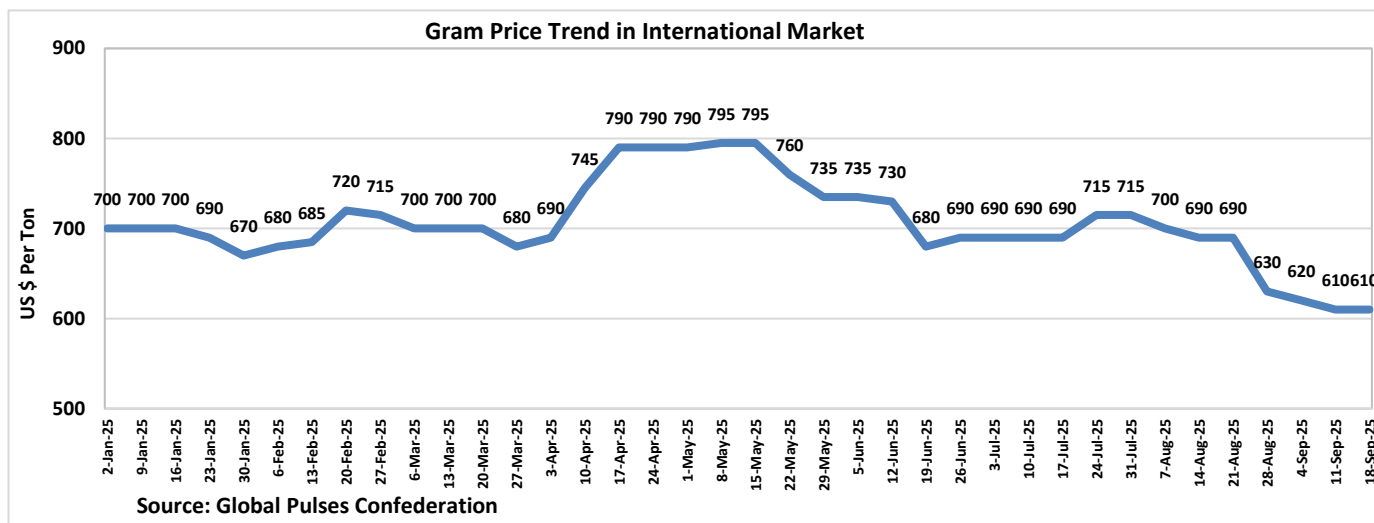


Price Control & Commodities Management Department



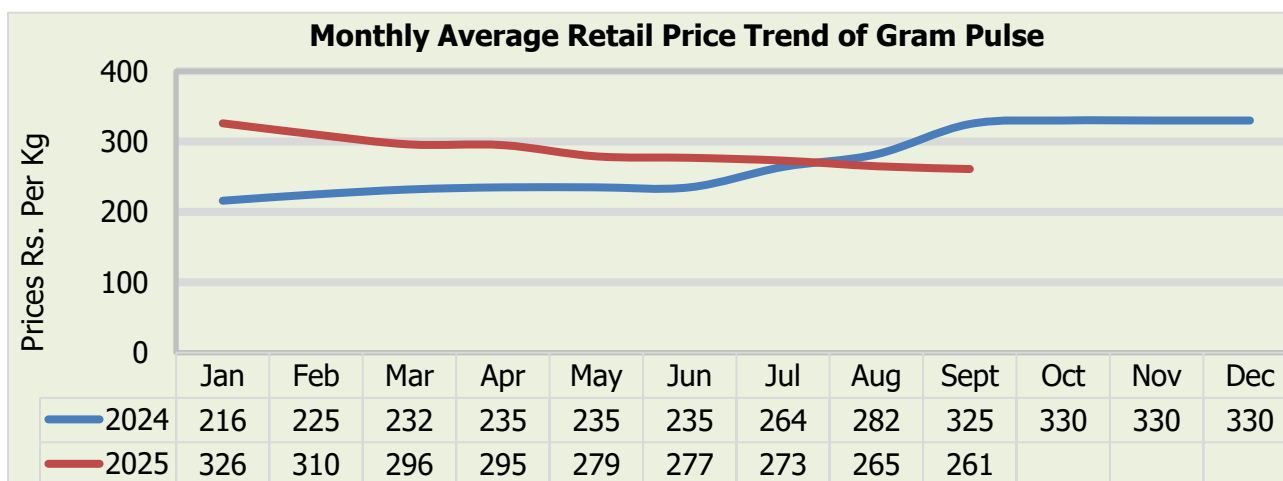
International Market Trends

- Due to availability of gram crop from Canada, international prices of gram have significantly decreased from USD 700/ton to USD 610/ton. Moreover, gram crop from Australia is also expected to arrive during October-November, resultantly international market of gram is likely to remain stable. The weekly price trends reported by the Global Pulse Confederation, is outlined below:



Local Market Price:

- On account of decline in international prices, local prices of gram have also decreased in local markets. In Punjab, the average monthly retail price of gram pulse during month of Septmeber has been recorded at Rs. 261 per kilogram, which is comapartively less than last year price during correspondiong month.



SUPPLY MANAGEMENT ADVISORY

Assessment



Local crop of gram is not available due to off production season and less production, thus supply of gram is heavily reliant on import from other countries. Currently, international prices of Gram are on lower side due to availability of crop from Canada & Australia. During August-September, 2025 international prices of gram have decreased from USD 700/ton to USD 610/ton. Thus, import of gram is smooth and resultantly prices of gram have also declined from Rs.273/Kg to Rs.261/Kg in local markets.

Forecast

In international market, supply of gram is stable due to arrival of fresh gram supply from Canada & Australia. Due to stability in international market, supply & price situation of gram is expected to remain stable in local markets.



Advisory



- The availability of gram supplies from Canada & Australia has led to a decline in international prices from USD 700 per ton to USD 610 per ton during August to September. As per market report, international prices are expected to further decline due to healthy gram crop in Australia. The Deputy Commissioners and EADAs (E&M) in Punjab should take this reduction into account while fixing gram prices in their respective districts during DPCC meetings.
- The Deputy Commissioners Faisalabad and Sargodha may persuade their local traders/ importers to ensure uninterrupted import of gram to get maximum benefits from recent decline in international prices of gram.
- Price Control Mechanism should be further strengthened to control over profiteering and over charging by the retailers.

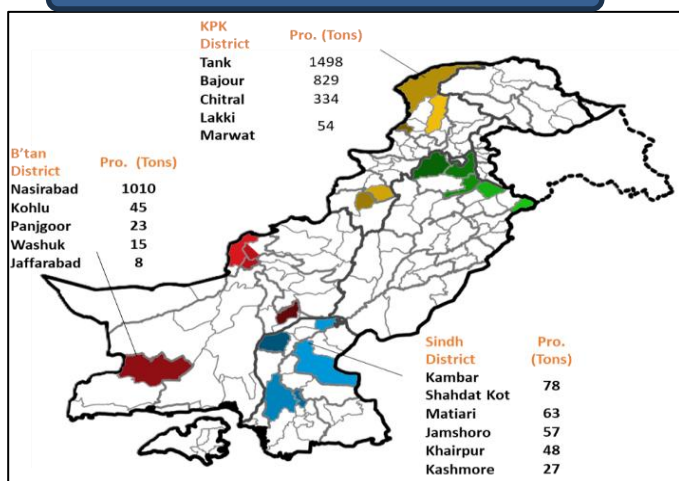
5. LENTIL (MASOOR)



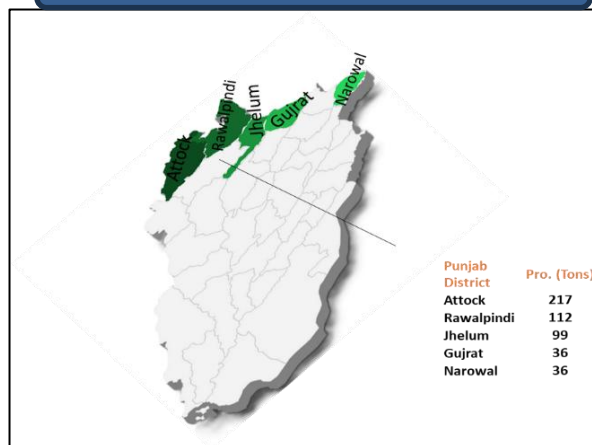
NATIONAL OVERVIEW

- Pakistan has negligible domestic production of Lentil (Masoor). However, masoor is mainly grown in Kyber Pakhtunkhwa with its 56% share in total domestic production. KP is followed by Balochistan with 24% share, Punjab 12% share and Sindh with 8% share.
- Major producing districts of gram in all provinces of the country have been mapped out as under:

Major Producing Districts of Masoor in Pakistan



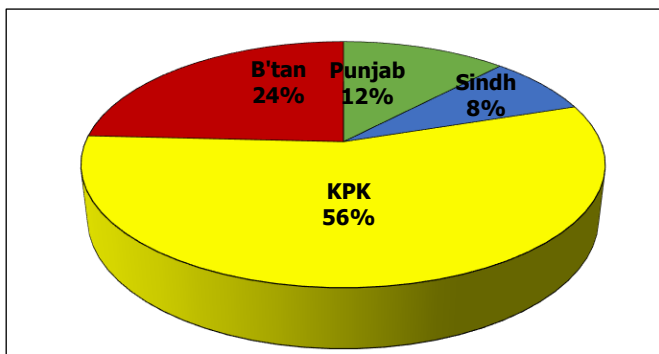
Major Producing Districts of Masoor in Punjab



Province Wise Production Share of Masoor



Price Control & Commodities Management Department

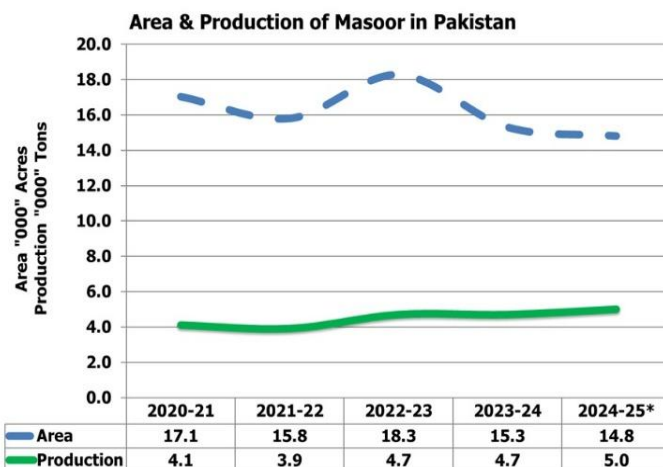


Key indicators

- **Punjab Production** = 546 tons,
- **Punjab Cons. Requirement** = 91,936 tons,
- **Punjab Deficit** = -91,390 tons,
- **Pakistan Production** = 5,000 tons,
- **Pakistan Cons. Requirement** = 1,73,880 tons
- **Pak Deficit** = -1,68,880 tons.
- **Import (2024-25)** = 1,38,991 tons,
- **Countries** = Australia, Canada & Afghanistan

Domestic Area & Production:

- Owing to inadequate domestic production, Pakistan remains heavily reliant on masoor (lentil) imports to meet national consumption needs.
- Over the past five years, domestic production of masoor has shown a modest upward trend. In year 2024-25, domestic production was estimated at 5,000 tons, reflecting a 6.8 percent increase from the previous year and a 21.9 percent rise compared to year 2020-21. However, the cultivated area contracted to 14,800 acres, marking a 3.22 percent year-on-year decline and a sharp 86.95 percent reduction relative to year 2020-21.



*=Provisional

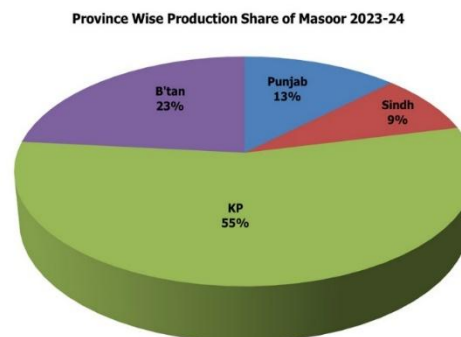
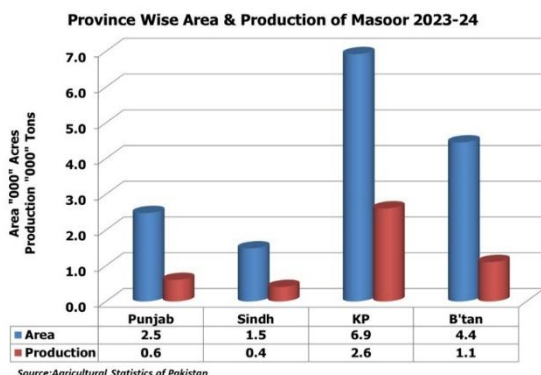
Source: Agricultural Statistics of Pakistan & Economics Survey of Pakistan 2024-25

Province wise Area & Production:

- A provincial comparison underscores that Khyber Pakhtunkhwa (KP) appeared to be leading producer with 55% of the total domestic output, which is followed by Balochistan (23%), Punjab (13%), and Sindh (9%).
- During year 2023-24, Khyber Pakhtunkhwa (KP) achieved masoor production of 2,600 tons from 6,900 acres.
- Balochistan followed with production of 1,100 tons, while Punjab and Sindh produced 600 tons and 400 tons, respectively.



Price Control & Commodities Management Department



Domestic Production & Domestic Consumption

- During year 2024-25, estimated domestic production was recorded at 5,000 tons against consumption requirements of 173,880 tons, resulting in a supply deficit of 168,880 tons.

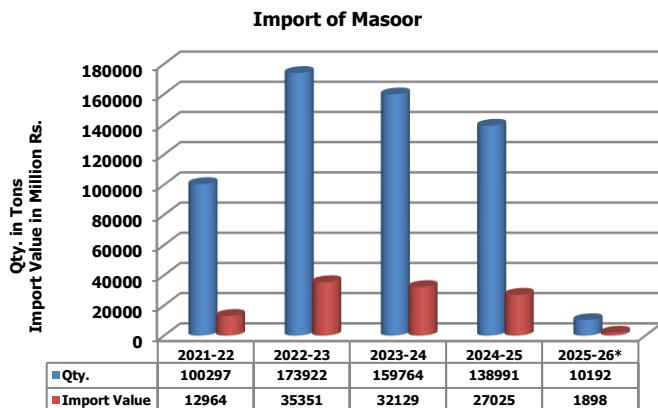
Import Insights

- Given the minimal scale of domestic production, Pakistan remains heavily dependent on masoor (lentil) imports to fulfill national consumption needs.
- During year 2024-25, the country imported 138,991 tons of masoor at a cost of Rs. 27,025 million, reflecting a decrease compared to the previous year. However, during year 2025-26 (July-August), imports amounted to 10,192 tons, valued at Rs. 1,898 million.
- Pakistan sources most of its masoor from Australia, Canada, Afghanistan and Russia. Major import volume is arranged from Australia & Canada, while imports from Afghanistan and Russia remain comparatively limited.



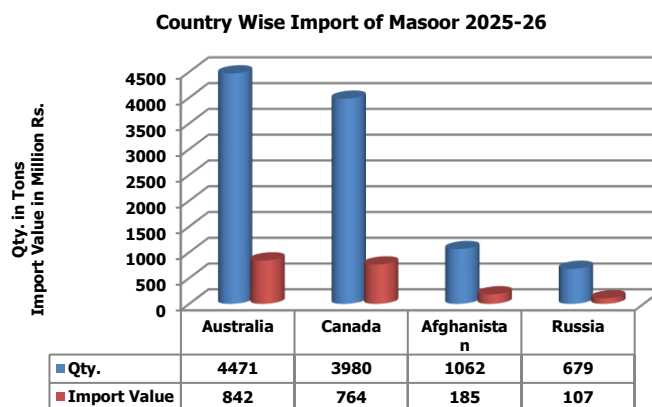
Price Control & Commodities Management Department

- During year 2025-26(July-August), Pakistan imported 4471 tons from Australia worth Rs.842.00 million, alongside 3980 tons from Australia at a cost of Rs. 764 million.



*=Import during July 2025 to August 2025

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



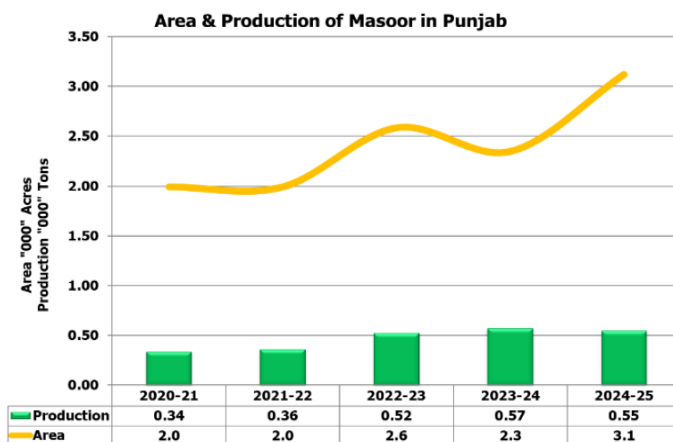
*=Import during July 2025 to August 2025

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

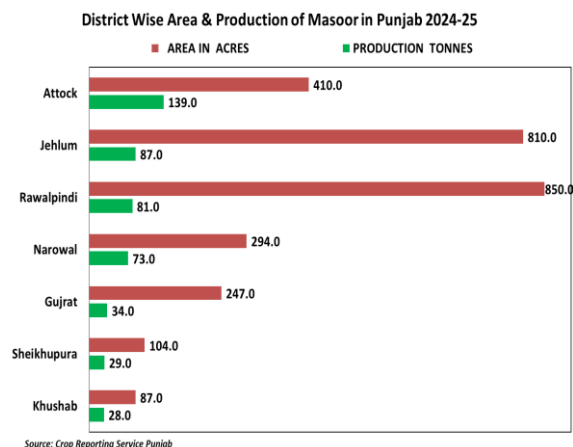
PROVINCIAL OVERVIEW

Area & Production:

- Punjab's contribution to domestic masoor production remains minimal due to its limited production. Both the cultivated area and production in Punjab have shown a gradual upward trend over the past five years, however production is yet negligible.
- During year 2024-25, the cultivated area reached 3,100 acres, which is 34.7 % higher than the previous year and 55% higher in contrast with year 2020-21. Production stood at 546 tons, reflecting a modest 3.5% decline compared to the previous year, yet a substantial 61.76% increase relative to year 2020-21.
- The major masoor-producing districts in Punjab are Attock, Jhelum, Rawalpindi, Narowal, Gujrat, Sheikhupura and Khushab. Among these, Attock ranks as the leading district, with the highest output of 139 tons harvested from 410 acres of cultivated land.



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



Source: Crop Reporting Service Punjab

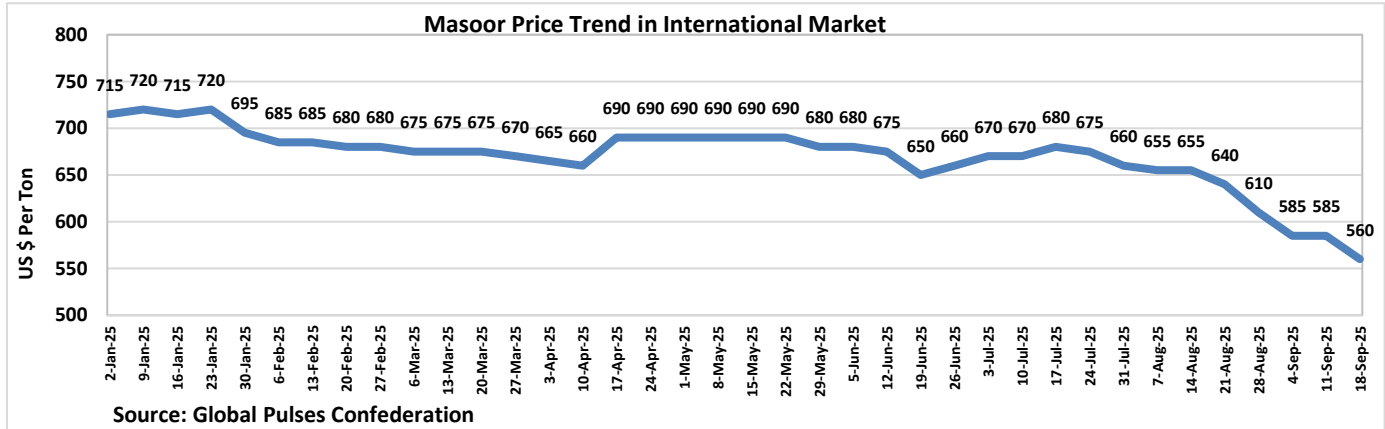


Price Control & Commodities Management Department



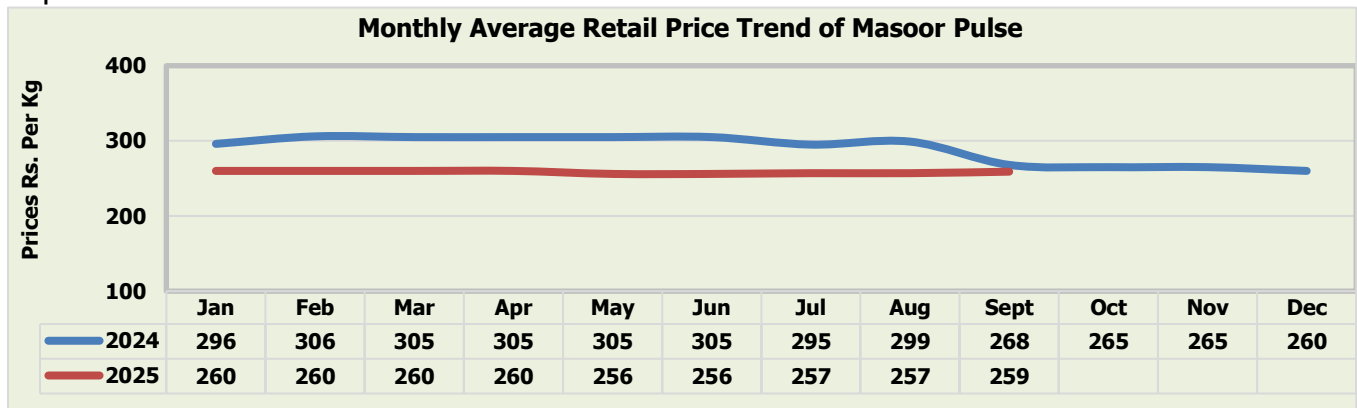
International Market Trend:

- As per availability of masoor crop from Canada, its international prices of Masoor have decreased from USD 655/ton to USD 560/ton during August to September. The weekly trend in international masoor prices, as reported by the Global Pulse Confederation, is illustrated below:



Local Market Price:

- The decline in international prices of masoor has facilitated smooth imports and led to a slight reduction in domestic prices. In Punjab, the average monthly retail price during September has been recorded at Rs. 259 per kilogram, reflecting stability compared to the previous month.



SUPPLY MANAGEMENT ADVISORY

Assessment

As a result of negligible domestic production, Pakistan remains largely dependent on imports to meet local demand. The availability of masoor crops from Canada & Australia have driven international prices downward, enabling uninterrupted imports into the country. Consequently, the supply and price situation of masoor is showing a stable trend in local markets.





Price Control & Commodities Management Department



Forecast

Due to the availability of masoor crop from Canada & Australia, international prices are showing a downward trend. Resultantly, import situation is smooth and prices are exhibiting stable trend in local markets. Due to stability in international market, the supply and price situation of masoor is anticipated to remain stable in local markets.



Advisory



- Deputy Commissioners & EADAs (E&M) across Punjab should take into account the decline in international prices during DPCC meetings to ensure that benefit of low prices may be transmitted to the general public.
- The Deputy Commissioners Faisalabad and Sargodha may persuade their local traders/ importers to ensure uninterrupted import of masoor to get maximum benefits from recent decline in international prices.
- Price Control Mechanism through Price Control Magistrates (PCMs) should be further strengthened to control over profiteering and over charging by the retailers.

6. MASH



NATIONAL OVERVIEW

- In case of Mash, domestic production is insignificant, necessitating import to meet domestic consumption requirements. However, mash is mainly grown in Balochistan with

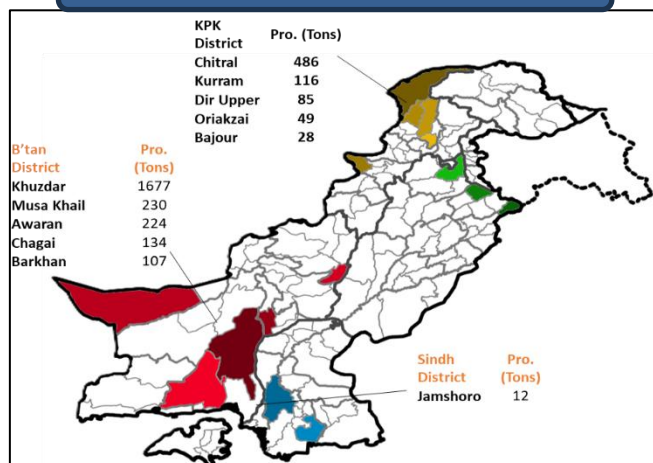


Price Control & Commodities Management Department

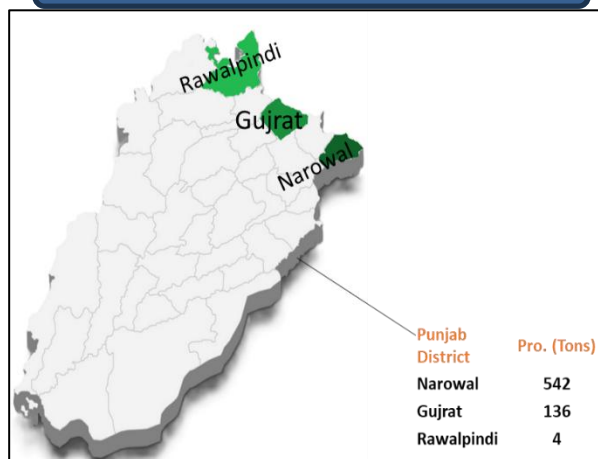
its 74% share in total domestic production. Share of KP and Punjab are 14% & 12%, respectively, whereas Sindh has no share in domestic production of mash.

- Major producing districts of mash in all provinces of the country have been mapped out as under:

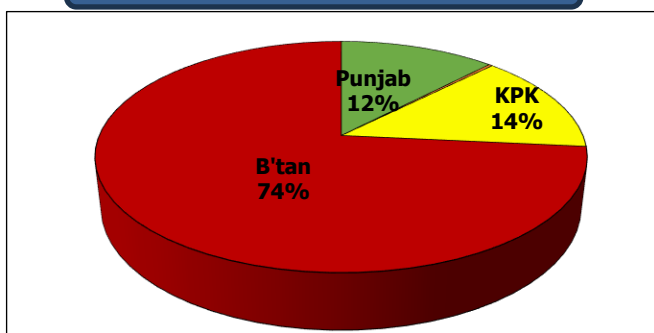
Major Producing Districts of Mash in Pakistan



Major Producing Districts of Mash in Punjab



Province Wise Production Share of Masoor



Key indicators

- Punjab Production** = 780 tons,
- Punjab Cons. Requirement** = 76,613 tons,
- Punjab Deficit** = -75,833 tons,
- Pakistan Production** = 6,000 tons,
- Pakistan Cons. Requirement** = 1,44,900 tons,
- Pak Deficit** = -1,38,900 tons.
- Import (2024-25)** = 96,565 tons,
- Countries** = Myanmar, Afghanistan & Thailand

Domestic Area & Production:

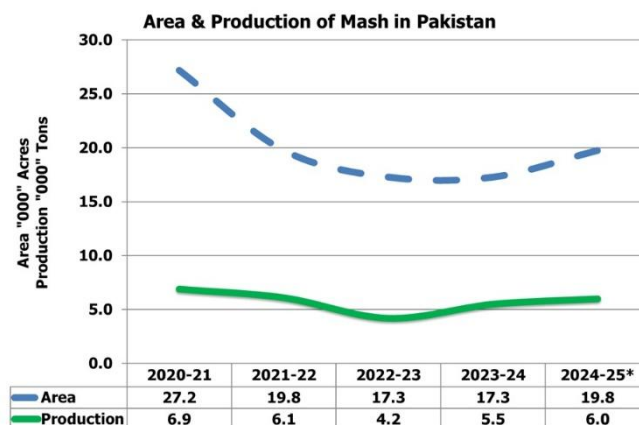
Province Wise Production Share of Mash



Price Control & Commodities Management Department



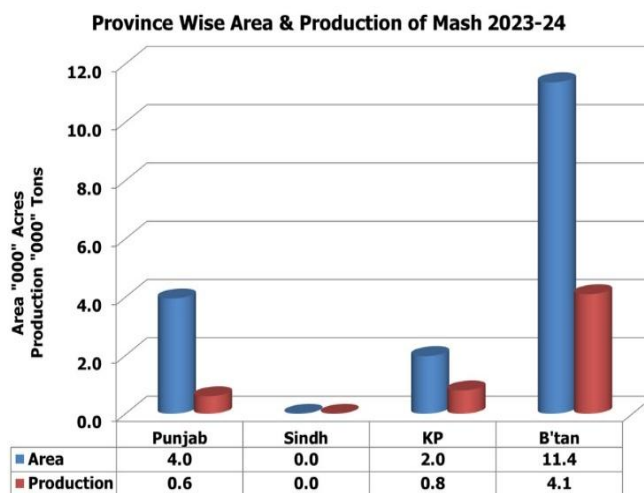
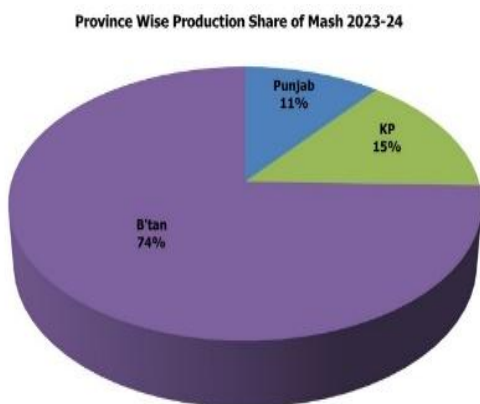
- Domestic production of mash remains minimal, with nearly 92% of national consumption needs being met through imports.
- Domestic cultivated area and production of mash have been showing slightly increasing trend over last 3 years. During year 2024-25, estimated domestic production has been recorded at 6000 tons which is 9.09% higher over last year production i.e. 5500 tons. The cultivated area recorded at 19,800 acres showing 14.4% higher as compared to last year acreage.
- Despite increase in acreage and production, domestic production is far less as compared to domestic consumption requirement.



*Provisional
Source: Agricultural Statistics of Pakistan & Economics Survey of Pakistan 2024-25

Province wise Area & Production:

- Balochistan emerged as the leading producer, contributing 74% of total production. It was followed by Khyber Pakhtunkhwa with 14% and Punjab with 12%, while Sindh reported no production.
- Provincial comparison reveals that during year 2023-24, Balochistan produced 4100 tons of mash and KP attained mash production at 800 tons.
- Punjab produced 600 tons of mash, whereas Sindh reported nil production of mash.



Source: Agricultural Statistics of Pakistan



Price Control & Commodities Management Department



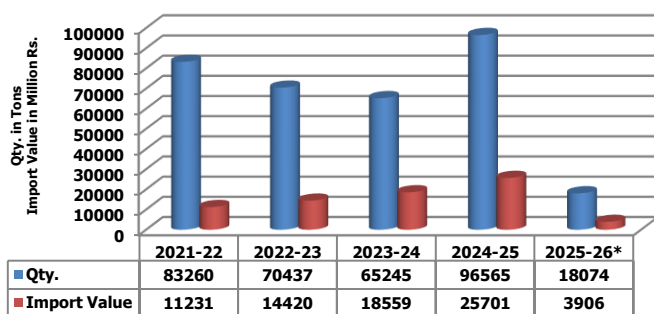
Domestic Production & Domestic Consumption:

- In fiscal year 2024–25, domestic output of mash is estimated at only 6,000 tons, against a national requirement of 144,900 tons—leaving a massive supply deficit of 138,900 tons

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 August), import of mash has been recorded at 18,074 tons, at expense of Rs. 3906 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 August), Pakistan imported 12,675 tons of mash from Myanmar and 17,802 tons from Afghanistan, while imports from Thailand stood at 100 tons

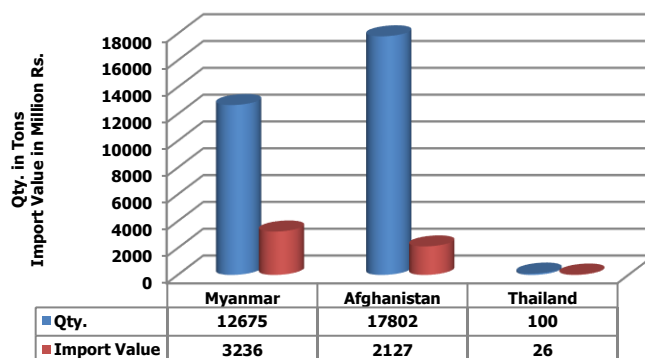
Import of Mash



*=Import during July 2025 to August 2025

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

Country Wise Import of Mash 2025-26



*=Import during July 2025 to August 2025

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

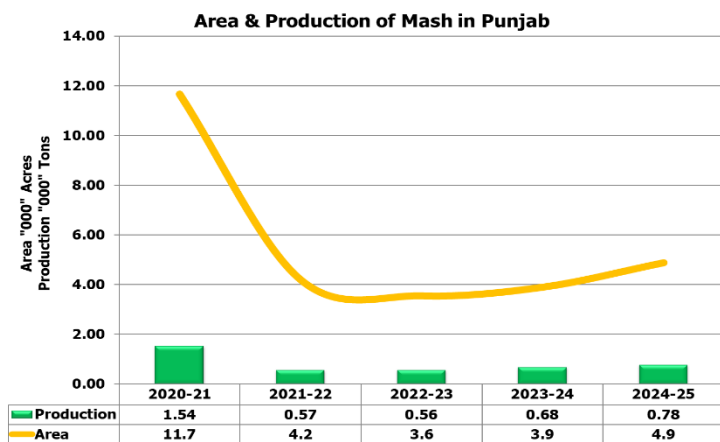
PROVINCIAL OVERVIEW

Area & Production:

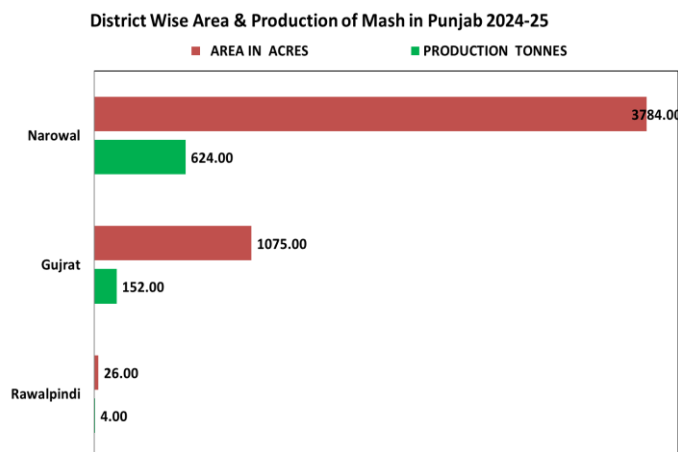
- In the year 2024-25, both the cultivated area and production of mash in Punjab showed slightly increasing trend over last three years.
- The cultivated area increased to 4,900 acres, representing a 25.6 percent year-on-year rise. However, this level still reflects a sharp 58.1 percent decline compared to year 2020-21.
- Similarly, mash production improved, reaching 780 tons in year 2024-25, showing 14.7% increase over last year. Nonetheless, this output remains 49.3% lower than recorded in year 2020-21, highlighting a sustained long-term reduction 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.



Price Control & Commodities Management Department



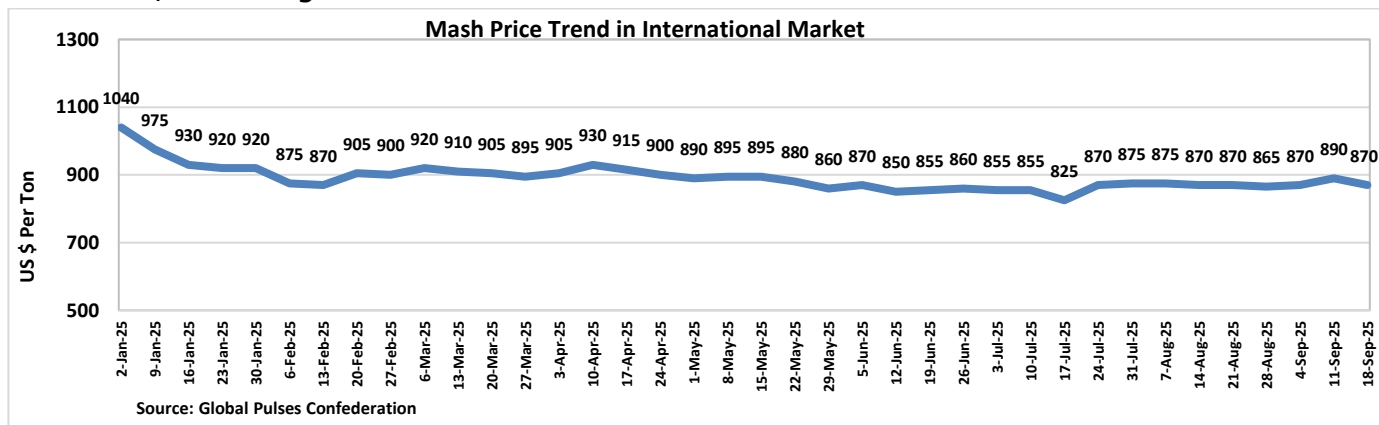
Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



Source: Crop Reporting Service Punjab

International Market Trend:

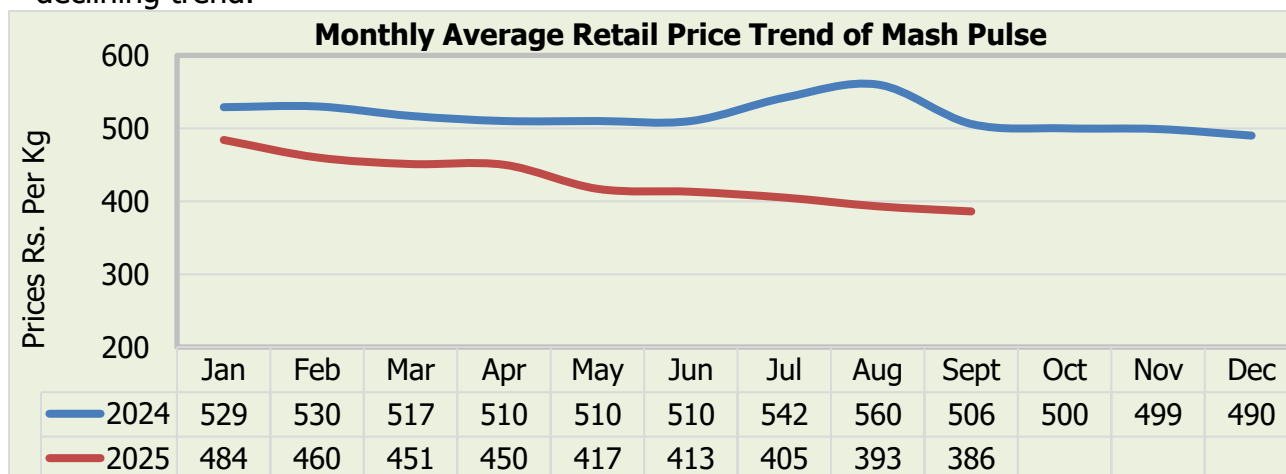
- The weekly trend of international prices of mash sourced from the Global Pulses Confederation, depicted decrease in international prices of Mash from USD 890/ton to USD 870/ton during last two weeks.



Source: Global Pulses Confederation

Local Market Price:

- Monthly average retail price of mash in Punjab is recorded at Rs. 386/kg during month of September. As a result of stable international prices of Masoor, its local price is also depicting declining trend.





SUPPLY MANAGEMENT ADVISORY



Assessment

Mash production in Pakistan remains minimal, leaving the country heavily reliant on imports to meet domestic consumption needs. However, mash crop from Afghanistan is readily available in local markets, which has improved supply situation and prices have started to decrease over the last month as well last year.

Forecast

Due to availability of mash crop from Afghanistan and decrease in international prices, import of mash is proceeding smoothly, thus supply and price situation of mash is expected to remain stable in local markets.



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 unrestrained import from Afghanistan to maintain stable supply in local markets.
- Price Control Mechanism may be strengthened with the help of Price Control Magistrates (PCMs), through regular inspections of retailers to enforce strict implementation of notified prices.

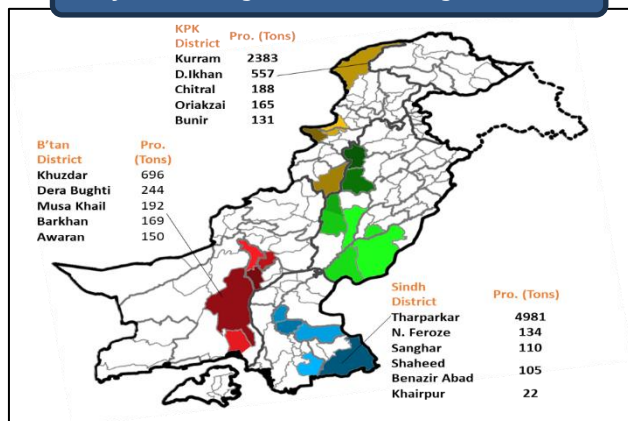
7. MOONG



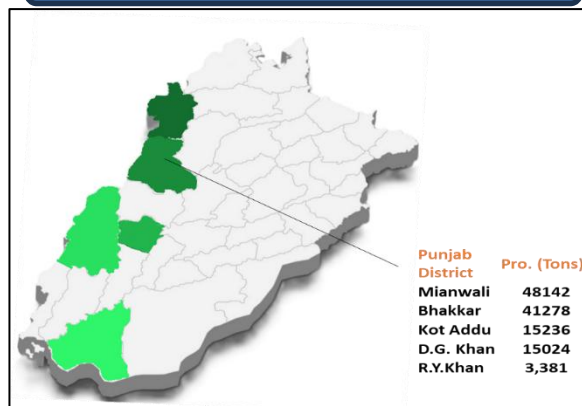
NATIONAL OVERVIEW

- Punjab is predominant province with reference to production of moong having 91% share in domestic production. Other provinces have negligible shares; Sindh has 5% share, whereas Balochistan and KP have only 2% share in total domestic production of moong.
- Major producing districts of moong in all provinces of the country have been mapped out as under:

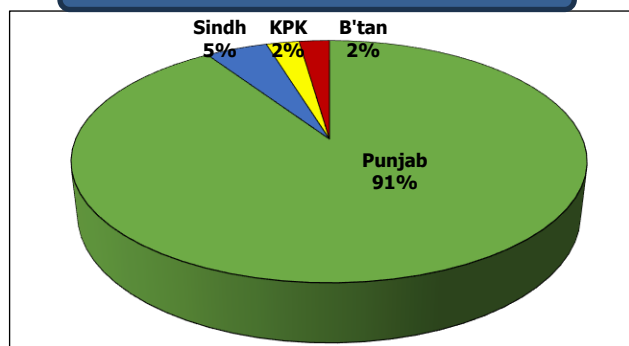
Major Producing Districts of Moong in Pakistan



Major Producing Districts of Moong in Punjab



Province Wise Production Share of Moong



Key indicators

- Punjab Production** = 1,15,633 tons,
- Punjab Cons. Requirement** = 1,07,259 tons,
- Punjab Surplus** = 8,374 tons,
- Pakistan Production** = 1,31,000 tons,
- Pakistan Cons. Requirement** = 2,02,860 tons,
- Pak Deficit** = -71,860 tons.
- Import (2024-25)** = 63,096 tons,
- Countries** = Argentina, Brazil & Tanzania

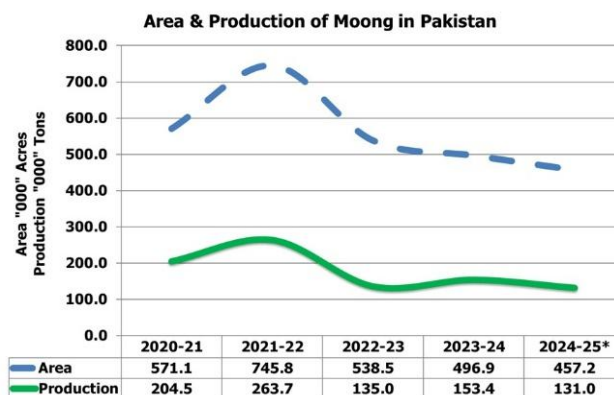


Price Control & Commodities Management Department



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 estimated at 131,000 tons, marking a 14.6% decline from the previous year and a 35.9% drop compared to year 2020-21.
- Similarly, the cultivated area shrank to 457,200 acres, representing a 7.9% decrease year-on-year and a 19.9% contraction relative to year 2020-21.

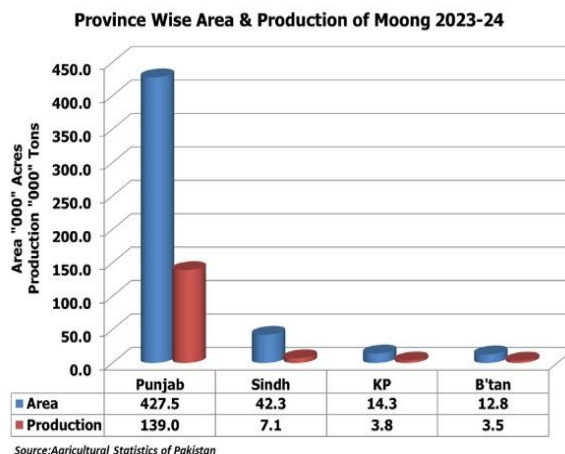
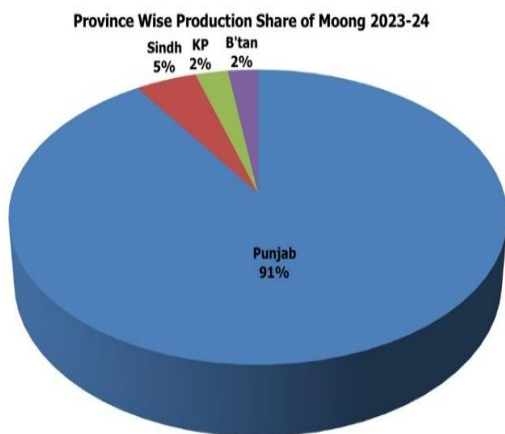


*Provisional

Source: Agricultural Statistics of Pakistan & Economics Survey of Pakistan 2024-25

Province wise Area & Production:

- Punjab remained the dominant contributor, accounting for 91% of total production, followed by Sindh with 5%, Balochistan with 2%, and Khyber Pakhtunkhwa with 2%.
- Punjab emerged as the leading producer of moong, producing 139,000 tons of moong from 427,500 acres.
- Sindh ranked second with production of 7,100 tons, while Khyber Pakhtunkhwa secured third place with 3,800 tons.
- Balochistan recorded the lowest production, contributing 3,500 tons.



Source: Agricultural Statistics of Pakistan



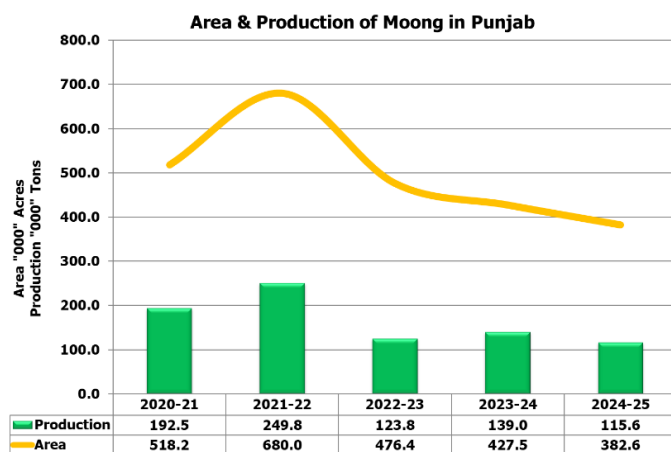
Price Control & Commodities Management Department



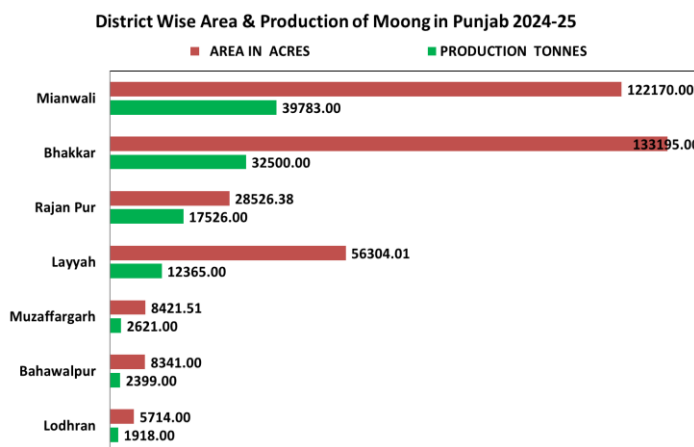
PROVINCIAL OVERVIEW

Area & Production:

- The cultivated area and production of moong in Punjab have shown considerable instability, following a gradual declining trend over the years.
- In 2024–25, Punjab's moong production was recorded at 115,600 tons, reflecting a 16.8% decrease compared to the previous year and a 39.9% decline relative to 2020–21. Similarly, the cultivated area stood at 382,600 acres, showing a 10.5% reduction from the previous year and a 26.2% decline compared 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:

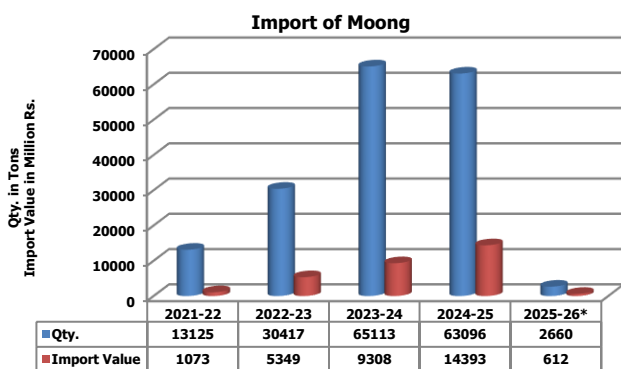
- During year 2024-25, domestic production of moong has been recorded at 1,31,000 tons which is comparatively less than consumption requirement of moong i.e. 2,02,860 tons, resulting in a supply deficit of 71,860 tons.

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 August), imports sharply declined to 2660 tons, valued at Rs. 612 million.
- Pakistan primarily sources moong imports from Argentina, Brazil, Tanzania, and Ethiopia.

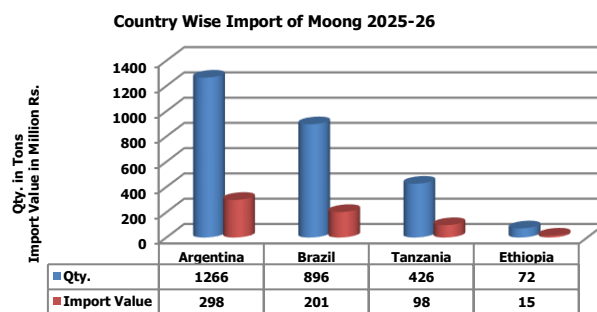


Price Control & Commodities Management Department



*=Import during July 2025 to August 2025

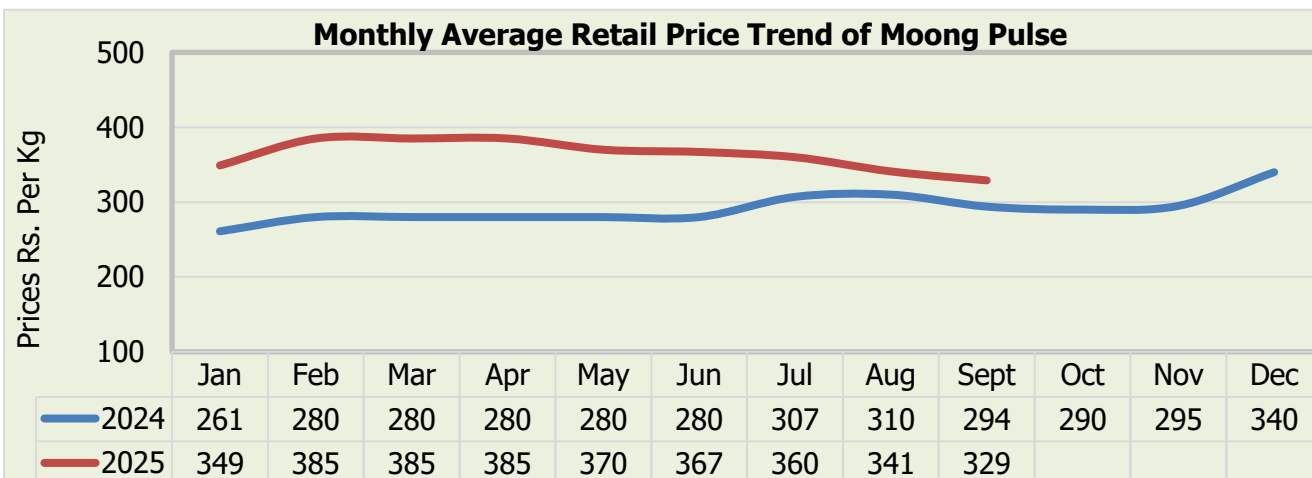
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)



*=Import during July 2025 to August 2025

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

- The arrival of the fresh moong crop in local markets has stabilized the supply situation, leading to a downward trend in its prices. In September 2025, the monthly average retail price of moong in Punjab was recorded at Rs. 329 per kilogram.



SUPPLY MANAGEMENT ADVISORY



Assessment

The local crop of moong is available in markets, which resulted in improved supply situation. However, this year production has been recorded less as compared to last year, subsequently price of moong is higher on year-on-year basis but less on month-on-month basis. Owing to the availability of the fresh crop, the price of moong has fallen from Rs. 360 per kilogram to Rs. 329 per kilogram.



Price Control & Commodities Management Department



Forecast

Local crop is available, however its production is 16.83% less over the least year, thus supply situation of moong is anticipated to remain under stress and prices are expected to increase in the local markets.



Advisory



- PAMRA Authority may take measures to undertake import of moong with the help of commission agents keeping in view the less domestic production.
- Price Control Mechanism should be strengthened with the help of Price Control Magistrates by controlling over charging by retailers.

The End