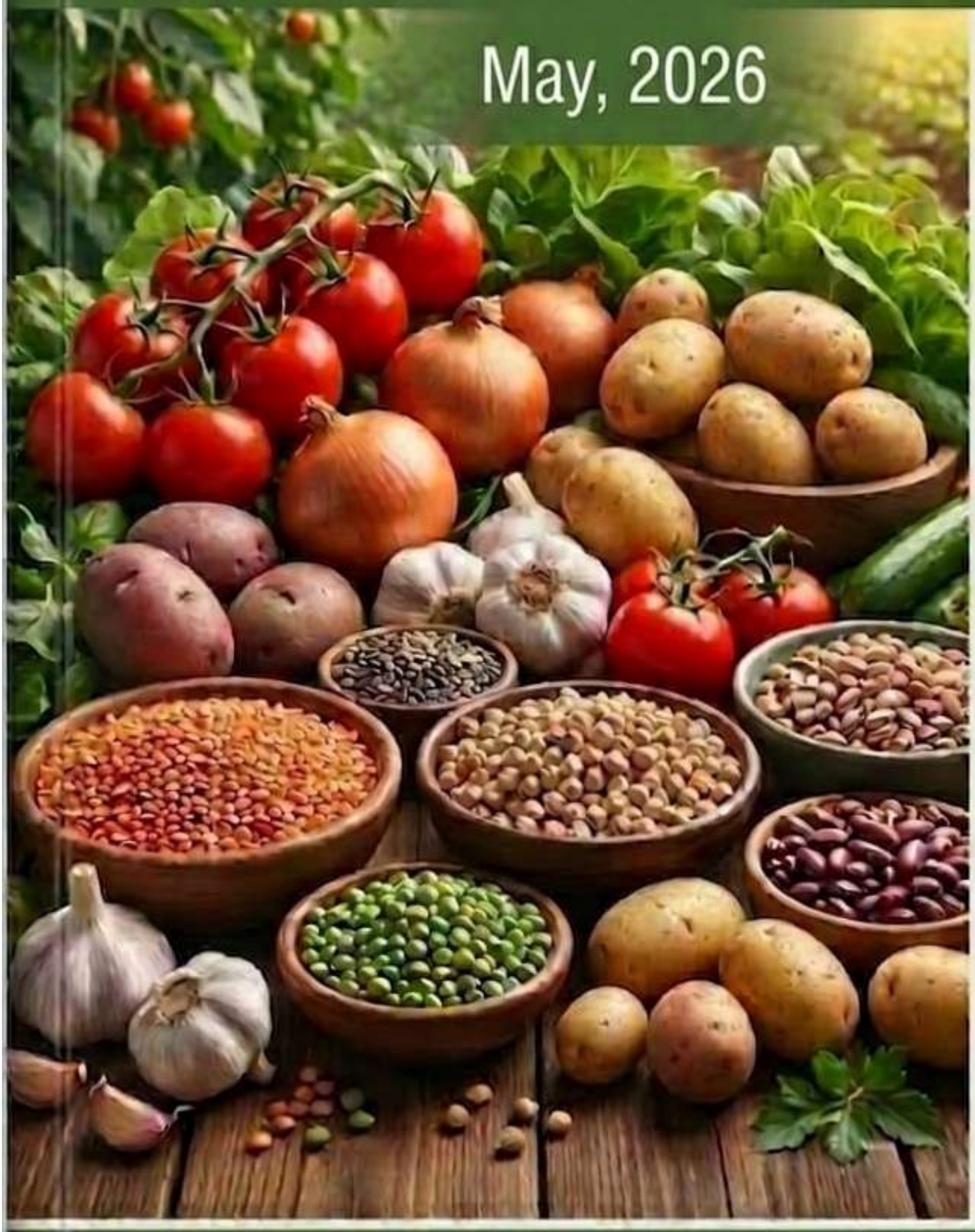
FOOD IN FOCUS

Directorate of Agriculture (Economics & Marketing)

Strengthening Agricultural Marketing Information Service (SAMIS) Project

May, 2026



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Current Market Assessment

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Advisory Measures

Food Safety and Consumer Protection Department

PREFACE

The Food Safety and Consumer Protection Department is pleased to release the nineteenth edition of its monthly bulletin, **"Food in Focus: Market Analysis Report."** This publication presents a detailed assessment of the supply and prices dynamics of essential food commodities, incorporating in-depth analysis of domestic production trends, consumption patterns, import and export movements, and key developments in international markets.

This edition also provides strategic policy recommendations for the District Administration, Agriculture Department, and Market Committees. It underscores the need for continuous monitoring of essential commodity supplies and the implementation of proactive measures to ensure their consistent availability at reasonable prices. Furthermore, the report draws attention to the persistent gap between domestic production and national consumption requirements, highlighting the ongoing dependence on imports to meet this shortfall.

We are confident that the insights and policy directions outlined in this report will assist stakeholders in making well-informed decisions and capitalizing on emerging opportunities within an increasingly dynamic food market. It remains our objective for "Food in Focus" to serve as a reliable reference and a strategic resource for stakeholders across the food sector.

ABSTRACT

This report has been prepared using data from a wide range of credible and authoritative 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), and the Global Pulses Confederation (GPC), along with the Crop Reporting Service Punjab and Market Committees across Punjab. The report presents a comprehensive analysis of production trends, supply dynamics, price movements, trade patterns, and developments in both domestic and international markets. It also provides in-depth insights into the current market situation, along with an assessment of expected future trends. A concise overview of the prevailing supply and price conditions for major vegetables and pulses is outlined below:

- **Tomato:** Main supply of tomato is arriving from Sindh. Local production season has also commenced, resultantly local supply is increasing gradually. Due to start of local production season, tomato supply has improved and its prices are showing declining trend in local markets.
- **Onion:** Supply of onion is mainly arriving from Sindh and local production season is also in progress. Supply of onion is sufficiently available from Sindh and Punjab, thus onion prices are on lower side in local markets.
- **Potato:** As a result of significant local production, supply of potato is in surplus and its prices are on lower side in local markets. Fresh supply from field will be available up till June, 2026, thereafter potato supply will be available from cold storages.
- **Garlic:** Due to start of local production season, local supply of garlic has improved and its process are on lower side in local markets. Local supply will remain available in significant quantum till July, 2026. Imports from China is also in progress as a cushion to supply situation.
- **Ginger**: As of negligible domestic production, consumption requirement of ginger is met through import round the year. Currently, import from Thailand is in progress due to which supply & price situation of ginger is stable in local markets. However, production season of ginger in Thailand is approaching its ends, afterwards its prices may increase in local markets.
- **Green chili**: Due to availability of local crop, supply of green chilies is stable, resultantly declining trend is being observed in prices of green chilies in local markets.
- **Pulses:** Local production season of gram has commenced in gram producing areas, and it is expected that this year crop will be healthy due to which local supply of gram will be available and its prices may come in normal range. International prices of gram are showing slightly increasing trend. As regards Mash, its production season has begun in Myanmar, resultantly its international prices are showing declining trend, which results in stability in its import, supply & price situation in local markets. In case of Masoor, its international prices are showing increasing trend, which may be observed in local prices as well. Local production season has also started but due to less production its impact will not be of considerable nature. In case of moong, prices are on higher side due to stress supply situation. Minor crop will arrive by end of May, 2026 but major crop will arrive during August, 2026, afterwards supply & price situation of Moong will be normal.

Advisory Measures:

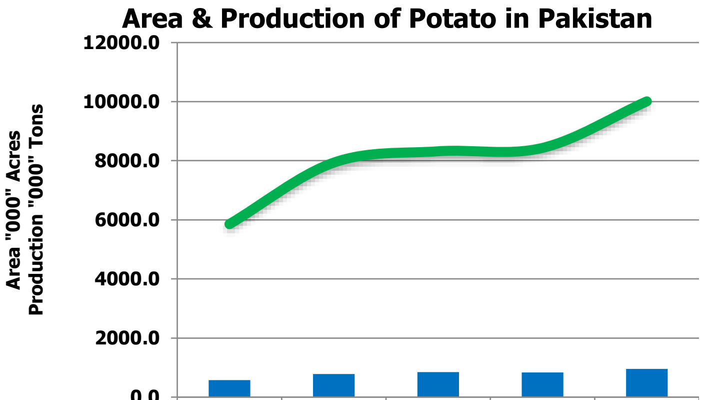
- The District Administration through concerned EADA (E&M) and Secretaries Market Committee, should carefully watch supply & price situation of essential commodities and take all pre-emptive measure to ensure stable supply chain management.
- The District Administration must take into account the start of local production season of gram as well as declining trend in international prices of mash due to start of production season in Myanmar, while fixing prices of gram and mash through meeting of District Price Control Committee (DPCC).
- The Agriculture Department should accelerate research on developing off-season seed varieties in order to widen the local production period of major vegetables and also introduce high-yielding pulse varieties to curtail the import burden.

1. Potato

NATIONAL OVERVIEW

Domestic Area & Production:

- The domestic production of potato has surpassed the quantity required for domestic consumption, resulting in an excess supply. Data provided by the Economic Survey of Pakistan and Agricultural statistics of Pakistan, reveals that national production of potato has climbed to 10.01 million tons during year 2024–25, showing a substantial 18.68% surge over the preceding year.
- Area and production curves of potato are showing consistently increasing trend during period from year 2020-21 to year 2024-25.

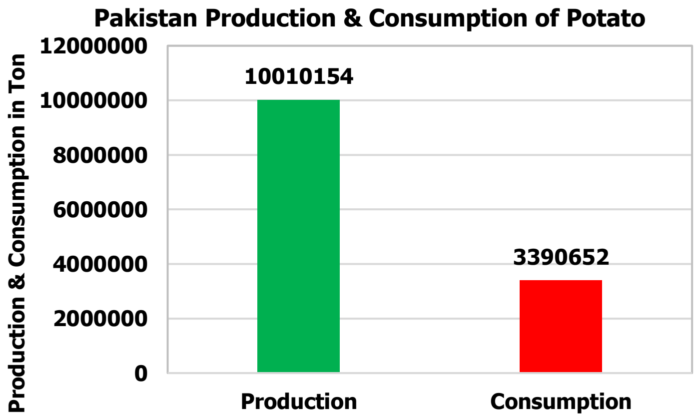


	2020-21	2021-22	2022-23	2023-24	2024-25
Area	579.1	776.2	841.6	837.0	955.5
Production	5854.2	7936.9	8319.8	8434.1	10010.2

Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics

Domestic Production & Consumption:

- The estimated annual domestic requirement for potato consumption stands at 3.390 million tons, whereas domestic production during year 2024–25 reached 10.010 million tons, resulting in a significant surplus of approximately 6.62 million tons.

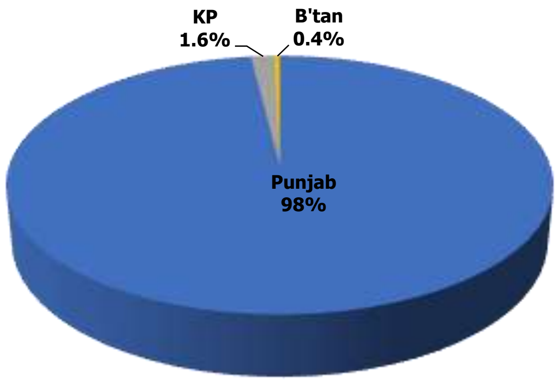


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

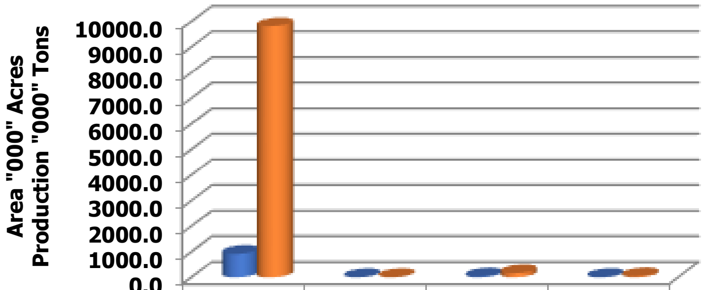
Province wise Area & production:

- Accounting for approximately 98% of the country's total potato output, Punjab remains the dominant centre of production in Pakistan. Beyond satisfying its own consumption requirements, the province serves as the principal supplier to other regions, while the share contributed by other provinces is relatively insignificant.
- During year 2024–25, Punjab produced 9.812 million tons of potato from 9,21,600 acres of cultivated area. By comparison, Khyber Pakhtunkhwa contributed 1,57,700 tons, making up only 1.6% of the national production. Production in Balochistan and Sindh was notably lower, recorded at 36,800 tons and 2,700 tons, respectively.

Province Wise Production Share of Potato 2024-25



Province Wise Area & Production of Potato 2024-25



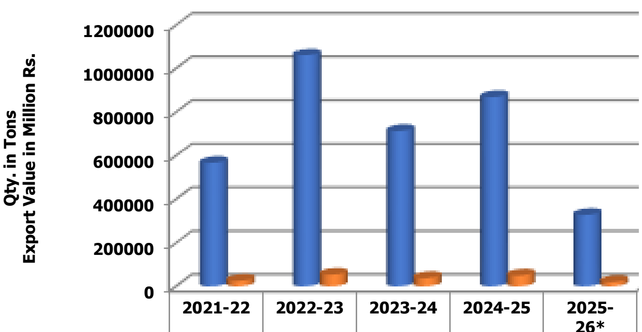
	Punjab	Sindh	KP	B'tan
Area	921.6	0.7	27.4	5.8
Production	9812.9	2.7	157.7	36.8

Source: Pakistan Bureau of Statistics (PBS)

Export Insights:

- Given its large-scale potato production, Pakistan exports considerable volume annually to earn foreign exchange. During the fiscal year 2024–25, potato exports totaled 868,605 tons, generating revenue of Rs. 48,905 million. During the period from July

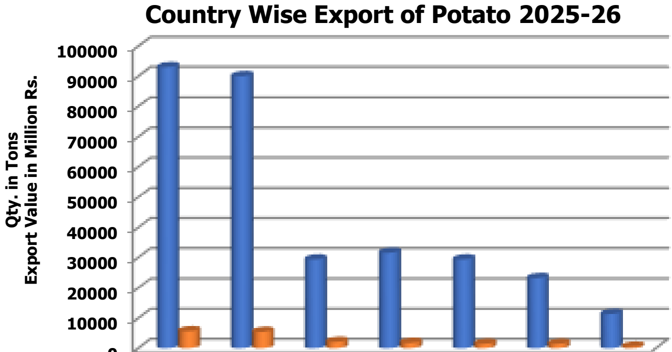
Export of Potato



	2021-22	2022-23	2023-24	2024-25	2025-26*
Qty.	566205	1060756	713951	868605	328004
Export Value	24891	52779	37386	48905	19530

**=Export during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

Country Wise Export of Potato 2025-26



	Sri Lanka	UAE	Qatar	Malaysia	Afghanistan	Oman	Uzbekistan
Qty.	93005	90052	29379	31561	29388	23284	11340
Export Value	5723	5488	2051	1721	1411	1398	480

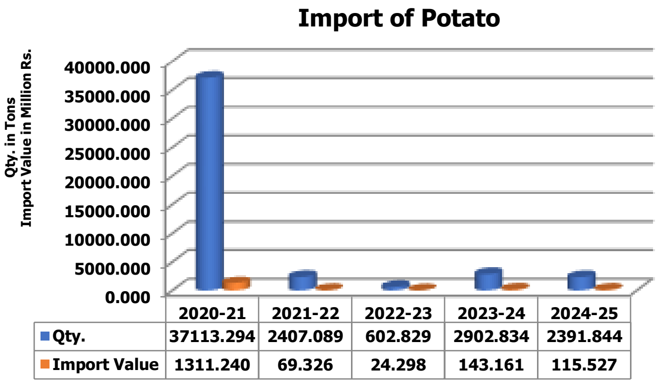
**=Export during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

to March of 2025–26, export volumes stood at 3,28,004 tons, generating Rs. 19,530 million in foreign exchange earnings.

- Key export markets for Pakistani potato include the Sri Lanka, United Arab Emirates, Qatar, Malaysia, Afghanistan, Oman and Uzbekistan.

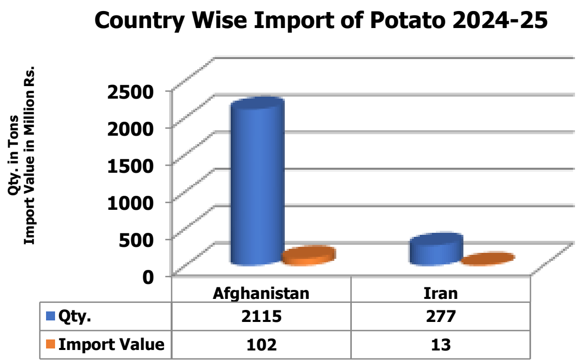
Import Insights:

- Owing to its sufficient domestic production, Pakistan does not rely on potato imports for consumption needs; however, a small quantity is imported solely for seed purposes. During year 2024–25, total imports were recorded at 2,392 tons, while no imports have been observed so far during 2025–26 (July–March). These seed imports are predominantly sourced from Afghanistan and Iran.



	2020-21	2021-22	2022-23	2023-24	2024-25
Qty.	37113.294	2407.089	602.829	2902.834	2391.844
Import Value	1311.240	69.326	24.298	143.161	115.527

Source: PBS & Pakistan Single Window



	Afghanistan	Iran
Qty.	2115	277
Import Value	102	13

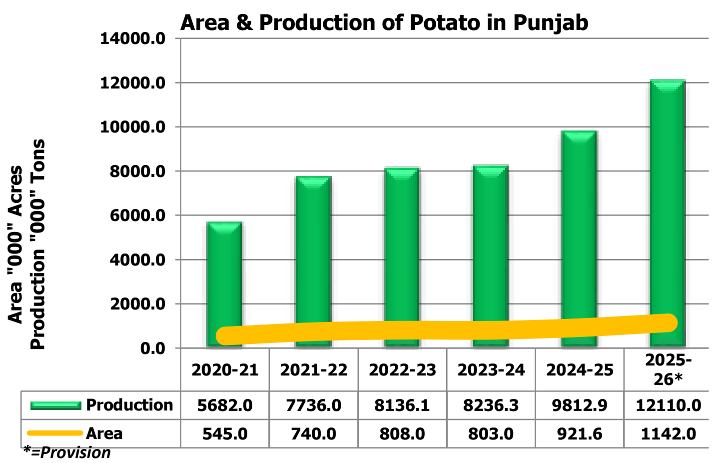
Source: Pakistan Single Window

PROVINCIAL OVERVIEW

Area & Production:

- Potato cultivation and output in the province have demonstrated a steady upward trajectory over the past five years. During year 2025–26, the area under cultivation expanded to 11,42,000 acres, representing a 23.9% rise compared to the previous year.

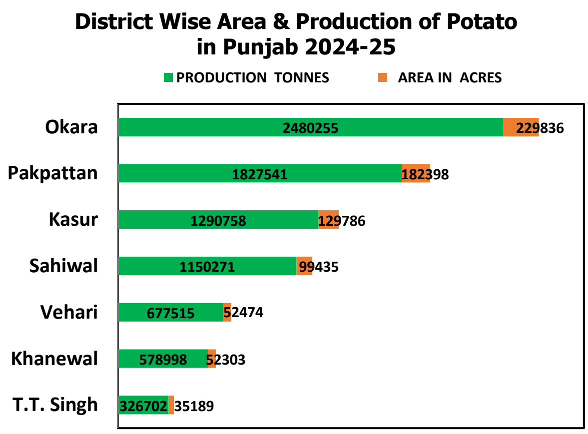
- In a similar pattern, potato production rose to 12.11 million tons during year 2025–26, reflecting a 23.4% increase over the preceding year.



	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26*
Production	5682.0	7736.0	8136.1	8236.3	9812.9	12110.0
Area	545.0	740.0	808.0	803.0	921.6	1142.0

*=Provision

Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

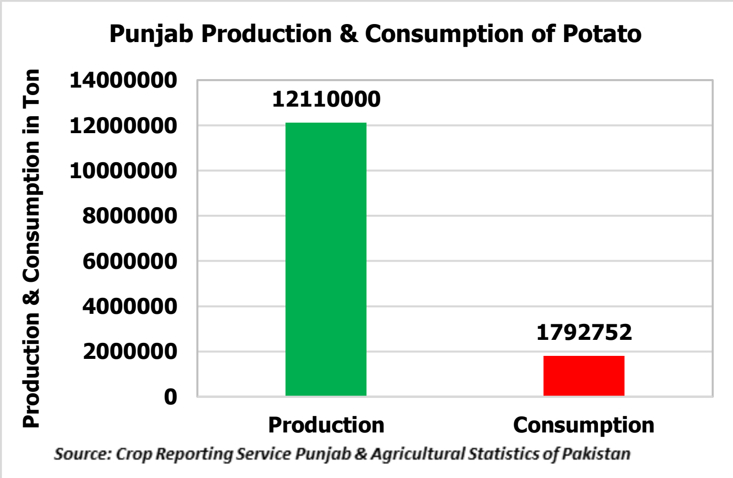


Source: Crop Reporting Service Punjab

- Major potato producing districts in Punjab include Okara, Pakpattan, Kasur, Sahiwal, Vehari, Khanewal and Toba Tek Singh. Okara is the leading potato-producing district, with a total output of 2.480 million tons. Other.

Provincial Production & Consumption:

- Punjab's potato production stood at 12.1 million tons during year 2025-26, while the estimated provincial consumption demand is 1.792 million tons. This created a substantial surplus of around 10.3 million tons in the overall potato supply.



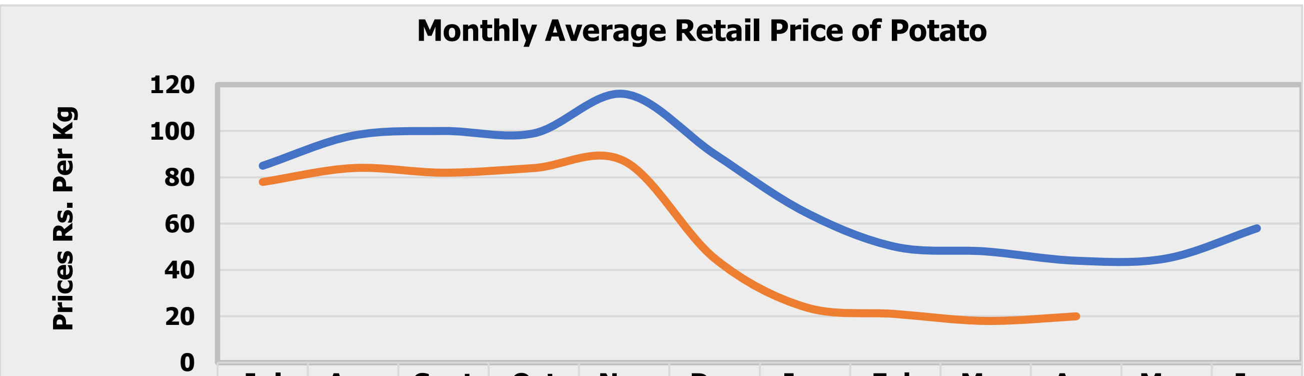
Supply Cycle:

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

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

Retail Market Prices:

- Due to the ongoing local production season of potato in Punjab, bulk supply of fresh potato is available at very less price in local markets. In April, the average retail price of fresh potato was recorded at Rs. 20 per kilogram.



	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2024-25	85	98	100	99	116	90	65	50	48	44	45	58
2025-26	78	84	82	84	87	45	24	21	18	20		

SUPPLY MANAGEMENT ADVISORY

Assessment

In the current year, Punjab's potato production has been estimated at 12.1 million tons, reflecting a 23.4% increase compared to the previous year, as reported by the Crop Reporting Service (CRS) Punjab. This marked rise in production has led to a surplus supply situation, resultantly potato prices are relatively low in local markets.

Forecast

- Given the ample availability of the local crop, potato supply is expected to remain steady, with prices likely staying on the lower side. Fresh potato from field dheries are anticipated to remain available until May 2026, after which market supply will gradually shift to stocks held in local cold storages.
- Due to rise in temperature, quality of field potato may be affected. Additionally, fresh arrivals from Khyber Pakhtunkhwa and Balochistan are expected during June and July, which will also supplement market availability of fresh potato.

Advisory

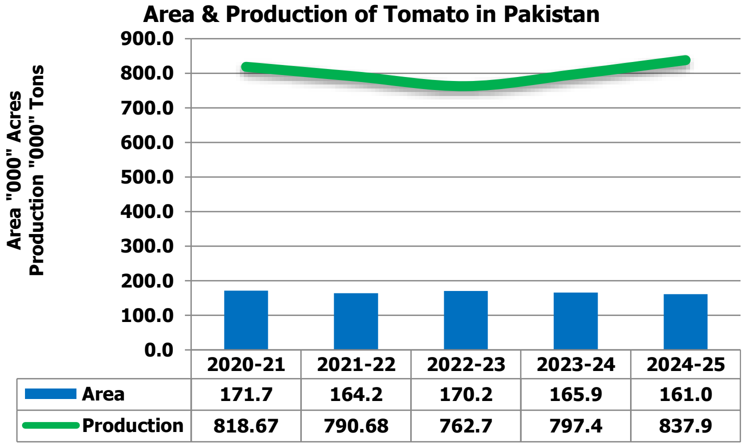
- Local production season is in full swing, however as per report of Pakistan Bureau of Statistics (PBS) a widen gap between notifed retail prices and open market prices has been observed. This unjustified gap should be reduced through regular monitoring by Price Control Magistrates to pass on relief of low prices to the general public.
- The District Administration, in coordination with the concerned EADA (E&M) and Secretaries of Market Committees, should continuously observe the supply and price situation of potato in local markets.
- EADA (E&M) and Secretaries Market Committee should regularly monitor auction proceedings in Agricultural Produce Markets to ensure that prices are determined in a fair and transparent manner. Furthermore, the notified wholesale prices must be strictly enforced within Agricultural Produce Markets.

2. TOMATO

NATIONAL OVERVIEW

Domestic Area & Production:

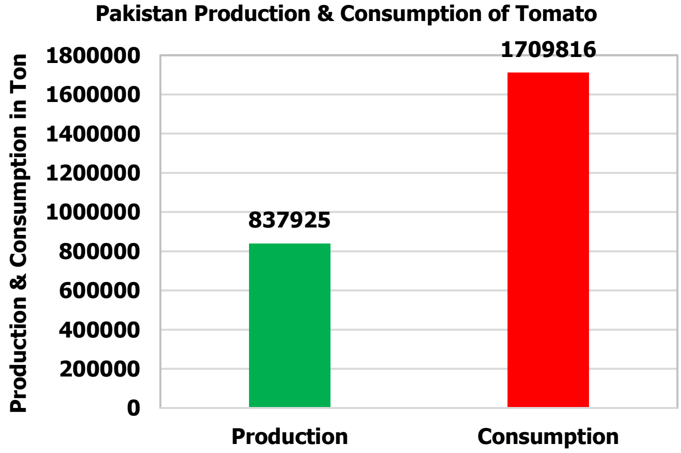
- Despite a marginal reduction in the area under cultivation, domestic tomato production has continued to show a consistent upward trend over the past three years. In 2024–25, national tomato production reached 837,925 tons, registering a 5.07% increase compared to the previous year. In contrast, the cultivated area declined to 161,000 acres, marking a decrease of 3.95% over the preceding year.



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

Domestic Production & Consumption:

- Even with the ongoing rise in domestic tomato production, the overall output still falls significantly short of national consumption needs. Against an estimated demand of 1,709,816 tons and a production level of 837,925 tons, the country faces an annual deficit of 8,71,891 tons.
- As a result, Pakistan remains dependent on tomato imports to maintain a stable and uninterrupted supply in local markets throughout the year.

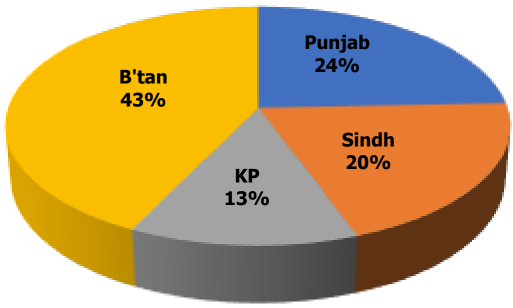


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

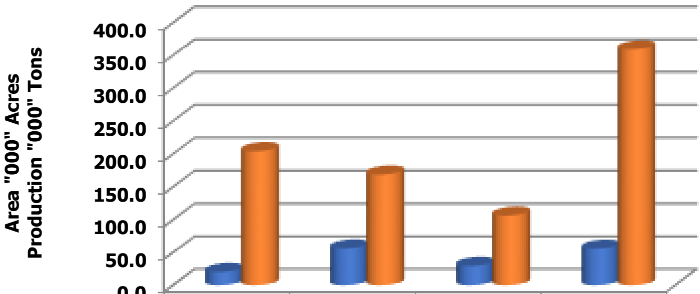
Province wise Area & Production:

- Balochistan stands as the leading tomato-producing province, accounting for 43% of the country's total output. Punjab has 24% share, Sindh with 20% share and Khyber Pakhtunkhwa contribute 13% share in domestic production of tomato.
- During 2024–25, Balochistan achieved the highest production level at 359,000 tons from 55,800 acres. Punjab followed with 204,000 tons produced from 19,900 acres, while Sindh recorded 168,600 tons from 56,200 acres. Khyber Pakhtunkhwa reported the lowest output among the provinces, with 106,300 tons harvested from 29,100 acres.

Province Wise Production Share of Tomato 2024-25



Province Wise Area & Production of Tomato 2024-25



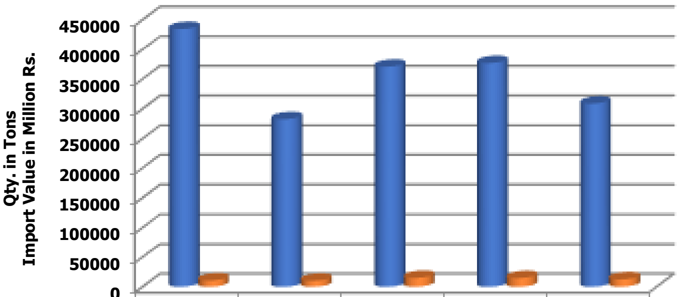
	Punjab	Sindh	KP	B'tan
Area	19.9	56.2	29.1	55.8
Production	204.0	168.6	106.3	359.0

Source:Agricultural Statistics of Pakistan

Import Insights:

- During periods of short domestic supply, Pakistan depends significantly on tomato imports from Afghanistan and Iran to fulfill domestic consumption requirements. In year 2024–25, tomato imports stood at 3,76,702 tons, with an import bill of Rs. 14,554 million, reflecting a slight increase in quantity but a marginal decline in value compared to the previous year.

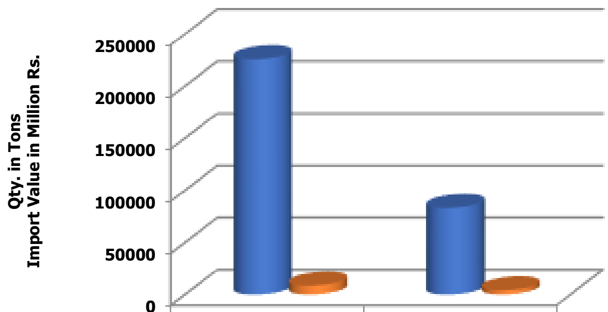
Import of Tomato



	2021-22	2022-23	2023-24	2024-25	2025-26*
Qty.	434583	282529	370596	376702	308718
Import Value	10603	10081	14900	14554	12536

**=Import during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

Country Wise Import of Tomato 2025-26



	Afghanistan	Iran
Qty.	225677	83041
Import Value	8483	4053

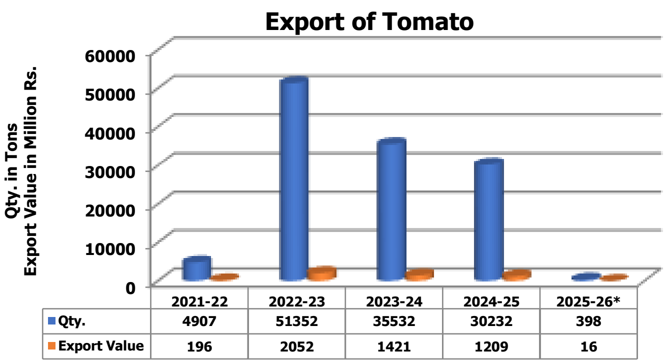
**=Import during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

- During year 2025–26 (July–March), imports recorded at 308,718 tons, incurring an expenditure of Rs. 12,536 million.

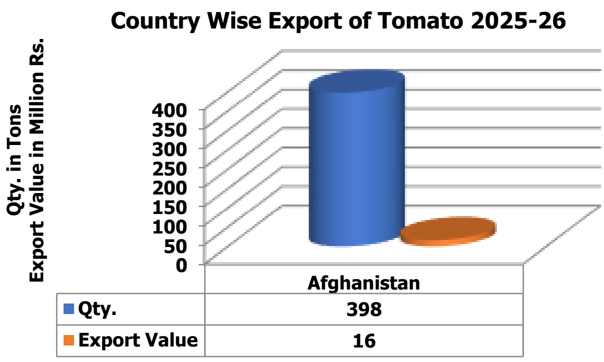
- Afghanistan and Iran remain the main sources of tomato imports for Pakistan. During 2025–26 (July–March), imports from Afghanistan were recorded at 225,677 tons with a cost of Rs. 8,483 million, while imports from Iran stood at 83,041 tons, amounting to Rs. 4,053 million.
- Since December 2025, Punjab has not required tomato imports due to sufficient availability of supplies from Sindh and now local production season has also commenced.

Export Insights:

- Regardless a strong dependence on imports to fulfill domestic demand, Pakistan also exports tomato. Although export volumes remain considerably lower than imports, they still contribute to foreign exchange earnings.
- In 2024–25, tomato exports stood at 30,232 tons, generating Rs. 1,209 million in revenue, indicating a slight decrease in both quantity and value compared to the previous year. During 2025–26 (July–March), exports amounted to 398 tons, earning Rs. 16 million, with Afghanistan serving as the main export destination.
- Tomato is mainly exported to Afghanistan & Iran especially during January to May period. However, due to tense border situation with Afghanistan and war situation in Iran, tomato export remained minimal during this year.



**=Export during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

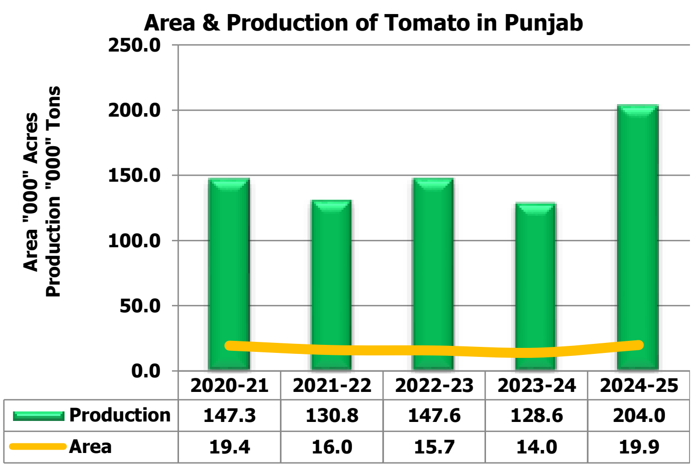


**=Export during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics

PROVINCIAL OVERVIEW

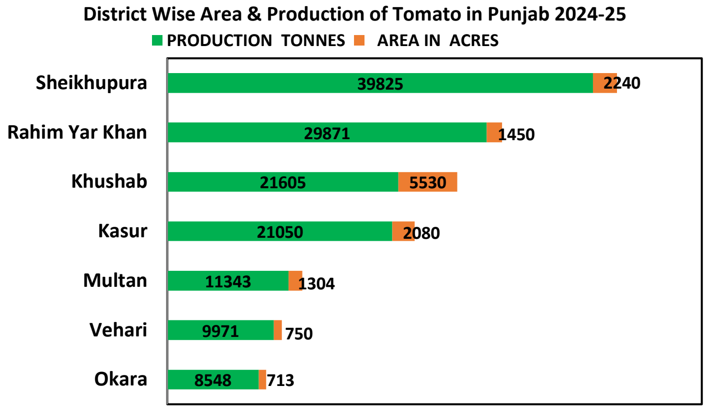
Area & Production:

- Tomato production in Punjab has experienced considerable variations over the past five years. In year 2024–25, tomato production was recorded at 204,000 tons. This reflected a significant increase of 58.6% over the preceding year.



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

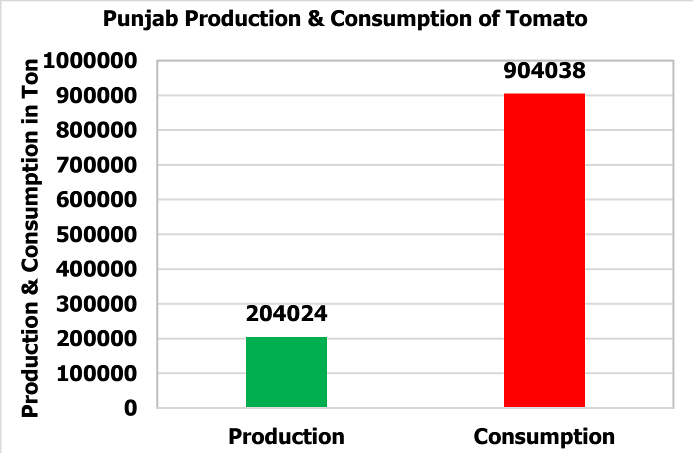
- The area under tomato cultivation also increased to 19,900 acres, marking a 42.14% rise compared to the previous year.
- Punjab's tomato production is mainly concentrated in a number of key districts, including Sheikhupura, Rahim Yar Khan, Khushab, Kasur, Multan, Vehari, and Okara.
- Among these, Sheikhupura emerged as the leading district with a production of 39,825 tons, followed by Rahim Yar Khan at 29,871 tons, while Khushab ranked third with an output of 21,605 tons.



Source: Crop Reporting Service Punjab

Provincial Production & Consumption:

- In 2024–25, total tomato production in the province stood at 204,024 tons, which was significantly lower than the estimated consumption requirement of 9,04,038 tons. This gap resulted in a substantial shortfall of 7,00,014 tons.



Source: Crop Reporting Service Punjab & Agricultural Statistics of Pakistan

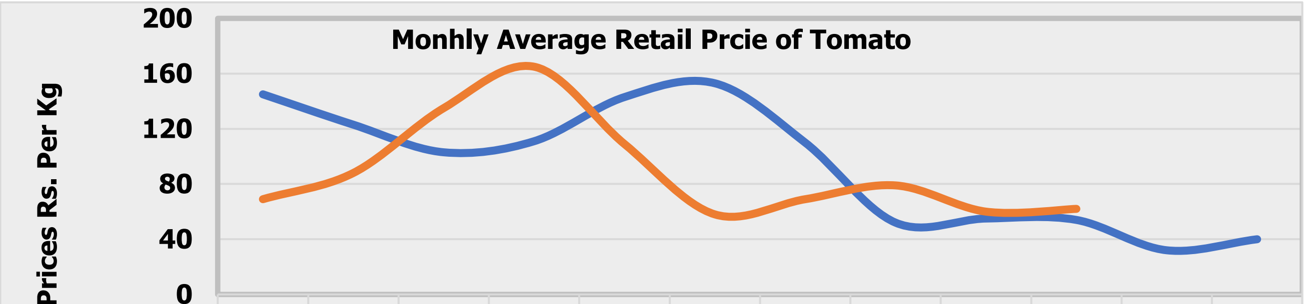
Supply Cycle:

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

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

Retail Market Price:

- The adequate supply of tomato is arriving from production areas of Sindh i.e. Thatta, Tando Allahyar & Larkana. In addition, local production season has also started. Resulatntly, supply situation of tomato is stable and prices are showing declining trend in local markets. The monthly average retail price of tomato in Punjab is recorded at Rs. 56 per kilogram in April 2026.



	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2024-25	145	123	103	111	143	153	110	52	55	54	32	40
2025-26	69	88	135	165	109	58	69	79	60	62		

SUPPLY MANAGEMENT ADVISORY

Assessment

Tomato is mainly available from Sindh, however local production season has also commenced and local supply is improving gradually, resultantly supply situation of tomato has improved and prices are exhibiting declining trend in local markets.

Forecast

As local production season of tomato has begun, thus local supply will increase gradually and replace the supply arriving from Sindh. Due to availability of local crop, supply & price situation of tomato is anticipated to be normal.

Advisory

- Due to commencement of local production season, prices of tomato must be on lower side. However, as per Pakistan Bureau of Statistics (PBS) there is a widen gap between notified retail prices and open market prices. Price Control Magistrates should actively perform to curtail this gap and curb profiteering by the retailers to pass on relief to general public.

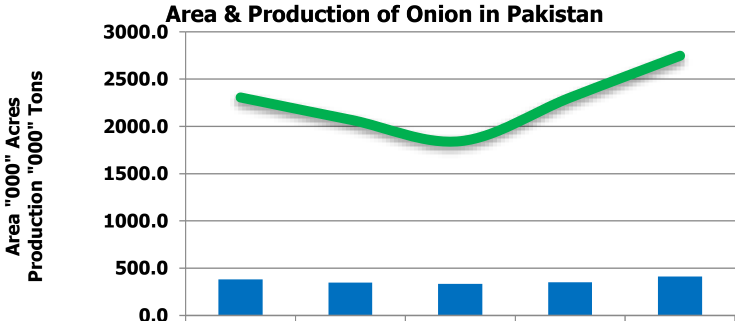
- The District Administration, in coordination with the concerned EADA (E&M) and Secretaries of Market Committees, should closely monitor the tomato supply situation to assess supply & price situation.
- (E&M) and Market Committee Secretaries should conduct regular supervision of auction proceedings in Agricultural Produce Markets to ensure transparent price determination. They should also ensure strict enforcement of notified wholesale prices within the jurisdiction of these markets.

3. ONION

NATIONAL OVERVIEW

Domestic Area & Production:

- During the past three years, Pakistan has recorded a consistent upward trend in both onion production and the area under cultivation. In year 2024–25, national onion production reached 2.747 million tons, showing a 19.2% increase compared with the preceding year. During the same period, the cultivated area also grew to 410,600 acres, reflecting a year-on-year rise of 16.44%.



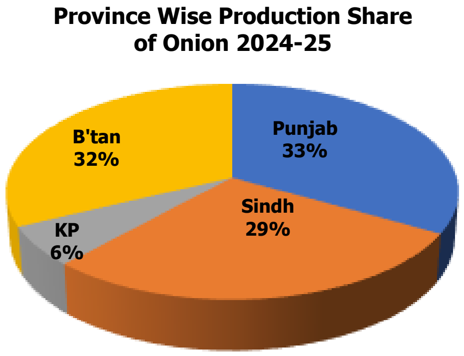
	2020-21	2021-22	2022-23	2023-24	2024-25
Area	380.0	348.0	334.8	352.6	410.6
Production	2305.7	2070.2	1843.5	2304.6	2747.1

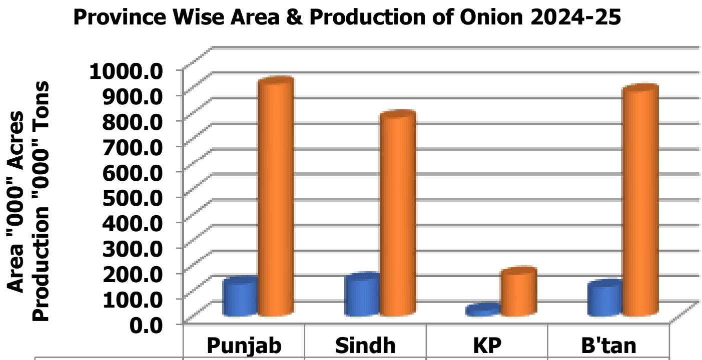
Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Province wise Area & Production:

- A notable shift in provincial onion production patterns was observed in 2024–25, when Punjab emerged as the leading producer, contributing 33% of the national production. It was followed by Balochistan with 32%, Sindh with 29%, and Khyber Pakhtunkhwa with 6%.
- In contrast, during year 2023–24, Balochistan held the top position in national onion production, Sindh ranked second, and Punjab remained third. However, this ranking changed considerably in 2024–25, as Punjab surpassed both provinces to become the largest onion-producing province in the country.

- In year 2024–25, Punjab emerged as the leading province in onion production, with a total output of 914,000 tons. It was followed closely by Balochistan, which produced 885,400 tons, while Sindh contributed 483,200 tons. Khyber Pakhtunkhwa accounted for a comparatively smaller share, with production recorded at 164,500 tons.



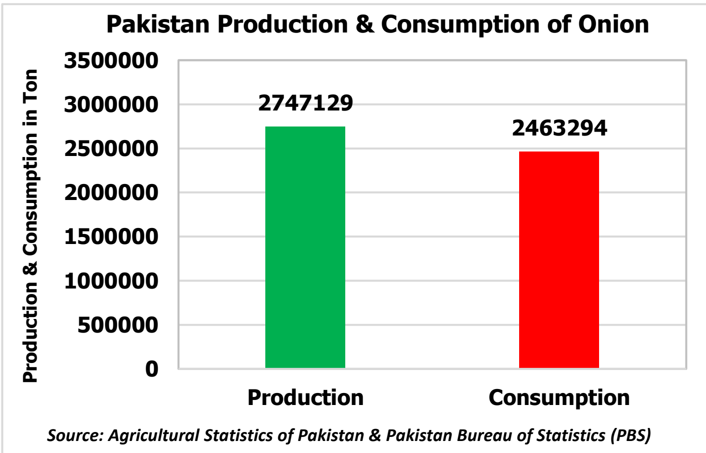


	Punjab	Sindh	KP	B'tan
Area	128.2	143.0	23.1	116.3
Production	914.0	783.2	164.5	885.4

Source:Agricultural Statistics of Pakistan

Domestic Production & Consumption:

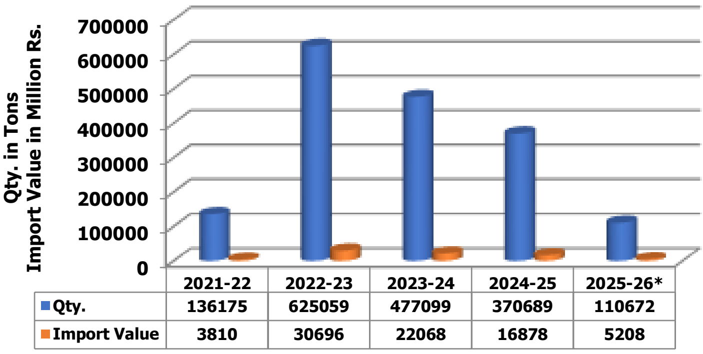
- In year 2024–25, national onion production reached 2,747,129 tons, which remained below the estimated consumption requirement of 2,463,296 tons, resulting in a shortfall of 2,83,833 tons. To bridge this gap, import from Afghanistan and Iran is required.



Import Insights:

- In year 2024–25, Pakistan imported 370,699 tons of onions at a cost of Rs. 16,878 million, reflecting a decline in both import volume and value compared to the previous year.
- In contrast, during year 2025–26 (July–March), onion imports amounted to 110,672 tons, with an expenditure of Rs. 5,208 million. Afghanistan and Iran remained the principal sources of these imports.
- After December, 2026 onion import is not required due to its sufficient availability from Sindh and Punjab.

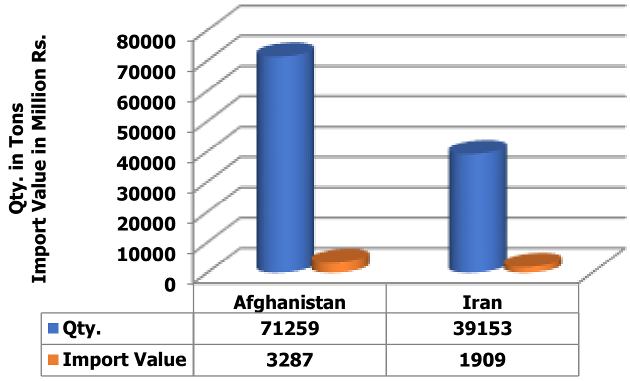
Import of Onion



	2021-22	2022-23	2023-24	2024-25	2025-26*
Qty.	136175	625059	477099	370689	110672
Import Value	3810	30696	22068	16878	5208

**=Import during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

Country Wise Import of Onion 2025-26



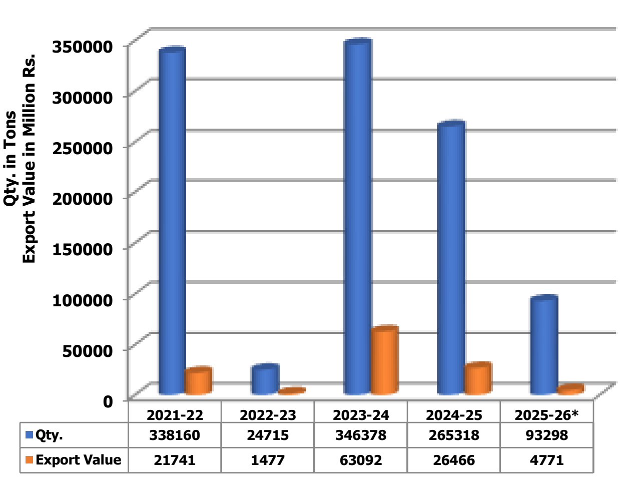
	Afghanistan	Iran
Qty.	71259	39153
Import Value	3287	1909

**=Import during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

Export Insights:

- Alongside meeting domestic needs through imports, Pakistan also exports onion to international markets, thereby contributing to foreign exchange earnings.
- In year 2024–25, onion exports were recorded at 265,318 tons, generating Rs. 26,466 million, although both volume and value declined compared to the previous year. During year 2025–26 (July–March), exports reached 93,298 tons, earning Rs. 4,771 million in foreign exchange.
- Pakistan's onion exports are mainly destined for Malaysia, the United Arab Emirates, Sri Lanka, Oman, Qatar, Singapore, and Bahrain. Among these, exports to Malaysia, the UAE, and Sri Lanka remained significantly higher than those to other markets.

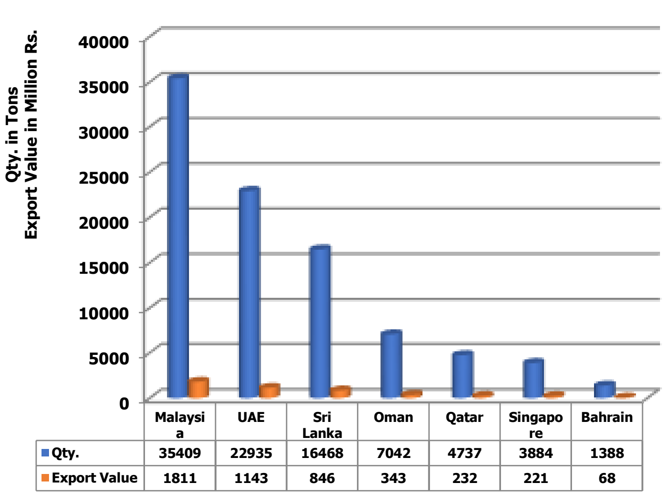
Export of Onion



	2021-22	2022-23	2023-24	2024-25	2025-26*
Qty.	338160	24715	346378	265318	93298
Export Value	21741	1477	63092	26466	4771

**=Export during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

Country Wise Export of Onion 2025-26



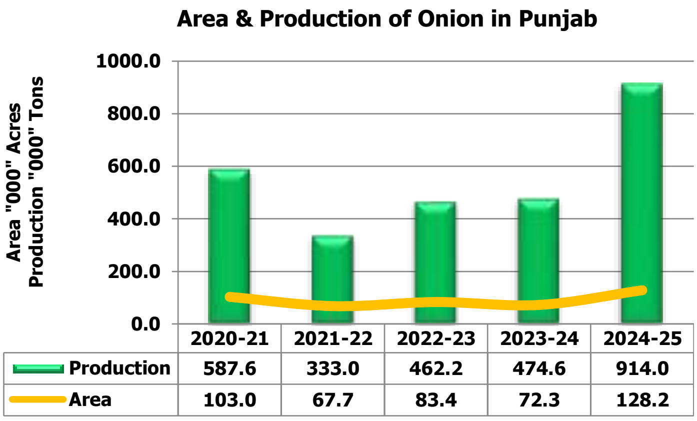
	Malaysia	UAE	Sri Lanka	Oman	Qatar	Singapore	Bahrain
Qty.	35409	22935	16468	7042	4737	3884	1388
Export Value	1811	1143	846	343	232	221	68

**=Export during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

PROVINCIAL OVERVIEW

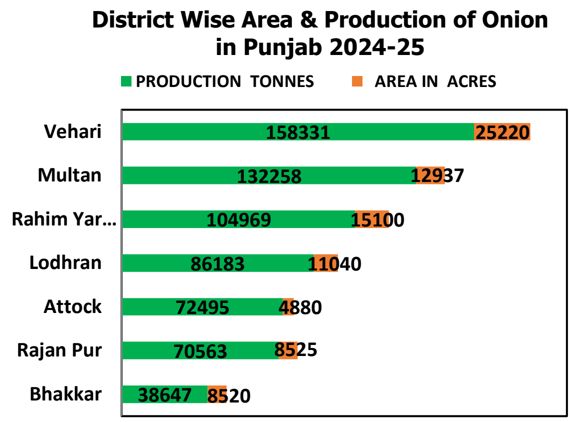
Area & Production:

- Over the last four years, onion production in Punjab has demonstrated a continuously increasing trend, notwithstanding area under cultivation has shown ups and down during said period.
- In year 2024–25, the cultivated area increased markedly to 128,200 acres, indicating a substantial rise of 77.3% compared to the previous year. Consequently, onion output surged to 914,000 tons, registering an impressive growth of 92.5% over the preceding year.



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

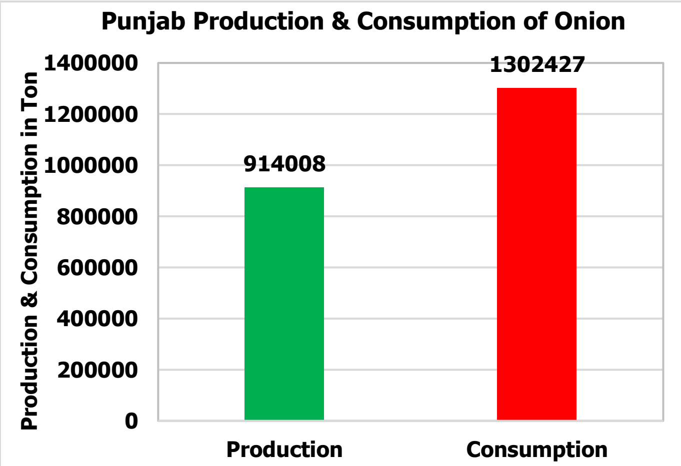
- The leading onion-producing districts in Punjab comprise Vehari, Multan, Rahim Yar Khan, Lodhran, Attock, Rajanpur, and Bhakkar.
- Vehari ranked first with an onion production of 158,331 tons. Multan secured second place with 132,258 tons, while Rahim Yar Khan stood in third position with 104,969 tons.



Source: Crop Reporting Service Punjab

Provincial Production & Consumption:

- During the 2024-25 fiscal year, provincial onion production totaled at 914,008 tons, failing to meet the estimated provincial demand of 1,302,427 tons and leaving a substantial shortfall of 388,419 tons.



Source: Crop Reporting Service Punjab & Agricultural Statistics of Pakistan

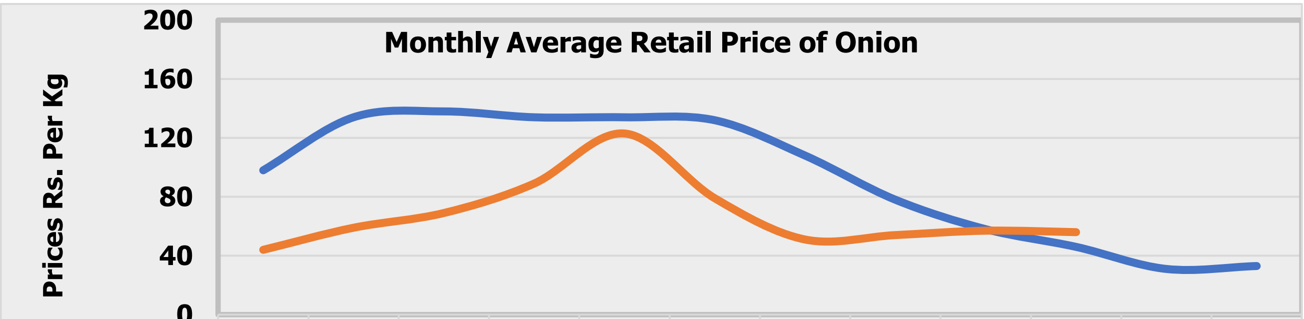
Supply Cycle:

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

Province	Top Production Districts	Availability of Onion Crop in Markets
Punjab	Vehari, Multan, Rahim Yar Khan, Lodhran, Attock, Rajan Pur & Bhakkar etc.	Jan 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:

- Due to sufficient availability of onion from Sindh along with start of local production season, supply situation is stable and onion price is on lower side in local markets. The graphical trend of monthly average retail price of onion in Punjab is given as under:



	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2024-25	98	134	138	134	134	132	108	78	58	46	31	33
2025-26	44	59	69	89	123	79	51	54	57	56		

SUPPLY MANAGEMENT ADVISORY

Assessment

Currently, main supply of onion about 70% is arriving from Sindh and production season in Punjab is also in progress which accommodates 30% of total supply. As a result of adequate supply arriving from Sindh and start of arrival from Punjab, onion supply is improving and its prices are on lower side in local markets.

Forecast

As local production season of onion is in progress, thus local supply of onion will gradually increase along with its sufficient availability from Sindh, therefore supply & price situation of onion is likely to remain normal in local markets.

Advisory

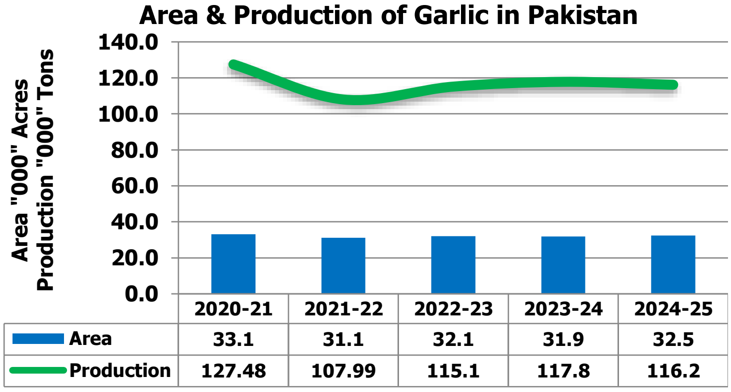
- Due to commencement of local production season, prices of onion must be on lower side. However, as per Pakistan Bureau of Statistics (PBS) there is a widen gap between notified retail prices and open market prices. Price Control Magistrates should actively perform to curtail this gap and curb profiteering by the retailers to pass on relief to general public
- The District Administration, in coordination with the concerned EADA (E&M) and Secretaries Market Committee, must consistently oversee onion availability and ensure a steady supply from Sindh and Punjab keeping close liaison with commission agents.
- The EADA (E&M), Secretaries Market Committee and Rep. of DC should supervise auction activities within Agricultural Produce Markets, ensuring that price discovery remains transparent and that officially notified rates are strictly enforced.

4. GARLIC

NATIONAL OVERVIEW

Domestic Area & Production

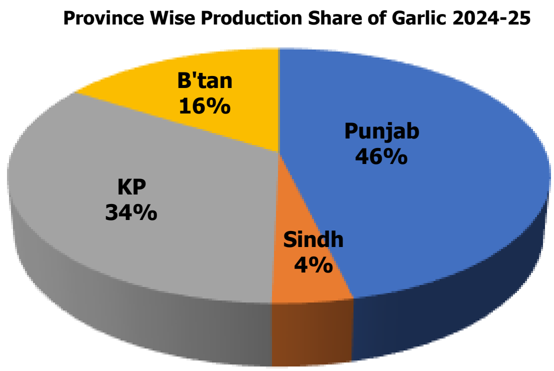
- Garlic farming in Punjab has maintained almost consistent pattern in both acreage and yield over recent years.
- For the 2024-25 season, garlic cultivation expanded to 32,500 acres, marking a modest growth of 1.88% from the year prior. Conversely, domestic output reached 116,200 tons, reflecting a slight contraction of 1.35% relative to the previous period.

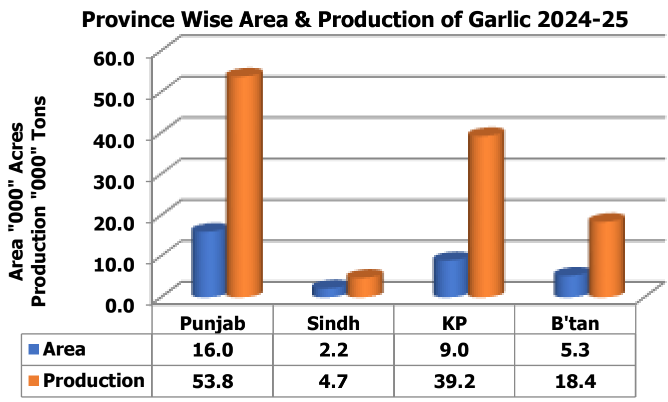


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Province wise Area & Production:

- Punjab maintains the primary share of national garlic production, generating 46% of the total volume, followed by Khyber Pakhtunkhwa at 34%, Balochistan at 16%, and Sindh at 4%.
- In the year 2024-25, Punjab produced 53,800 tons of garlic across 16,000 acres. By comparison, Khyber Pakhtunkhwa yielded 39,200 tons from 9,000 acres, while Balochistan generated 18,400 tons from 5,300 acres. Sindh reported the smallest contribution, with a harvest of 4,700 tons from 2,200 cultivated acres.

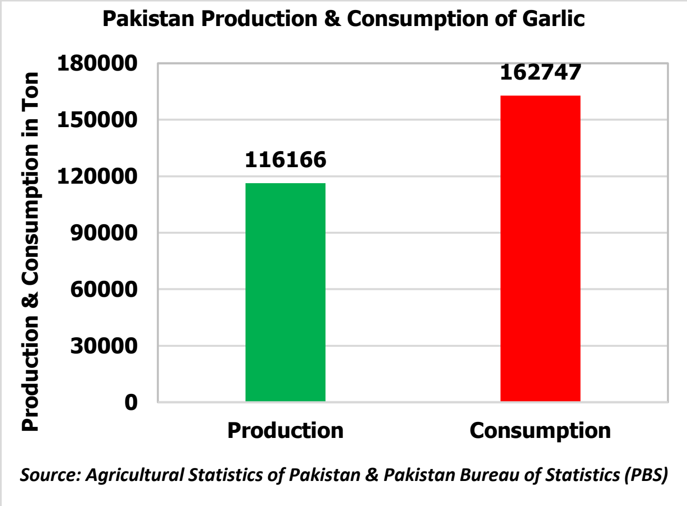




SourceAgricultural Statistics of Pakistan

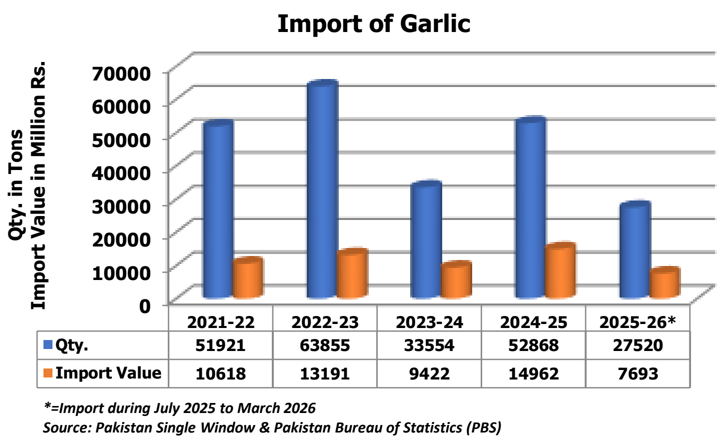
Domestic Production & Consumption:

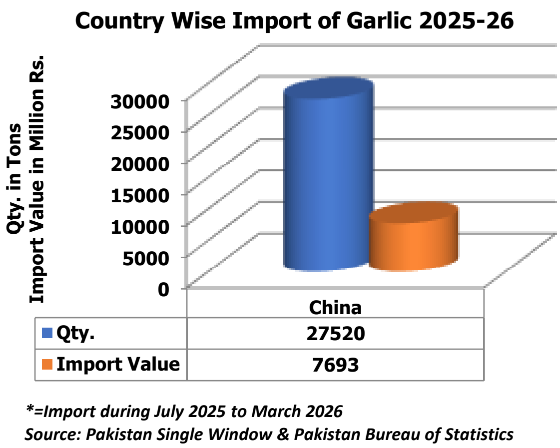
- During the 2024-25 period, domestic garlic production reached 116,166 tons, which fell short of the estimated consumption requirement of 162,747 tons, leading to a deficit of 46,581 tons.



Import Insights:

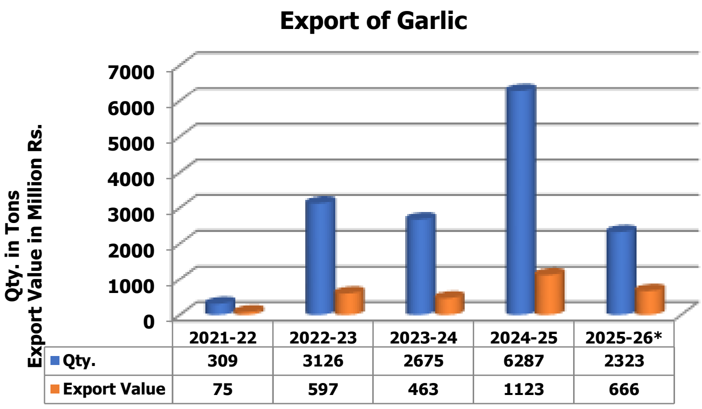
- To satisfy annual consumption demands, Pakistan maintains a heavy reliance on garlic imports, primarily sourced from China.
- During the 2024–25 period, total garlic imports reached 52,868 tons, at a cost of Rs. 14,962 million. During year 2025-26 (July–March), imports from China amounted to 27,520 tons, representing an expenditure of Rs. 7,693 million.





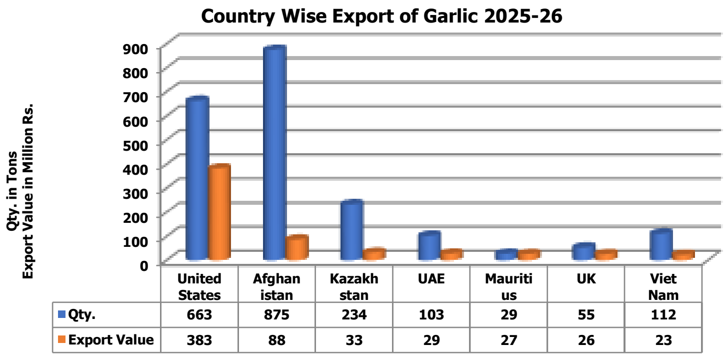
Export Insights:

- Garlic exports reached 6,287 tons in the 2024-25 year, yielding Rs. 1,123 million in revenue. For the 2025-26 period (July-March), export volume was recorded at 2,323 tons, adding Rs. 666 million to foreign exchange reserves.
- The primary destinations for Pakistani garlic include the USA, Afghanistan, Kazakhstan, the UAE, Vietnam, the UK, and Tajikistan.
- Afghanistan and the USA received the bulk of the export volume, whereas export to other countries are comparatively less. However, in terms of financial value, exports to the USA provide much higher returns than those sent to Afghanistan.



	2021-22	2022-23	2023-24	2024-25	2025-26*
Qty.	309	3126	2675	6287	2323
Export Value	75	597	463	1123	666

**=Export during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)



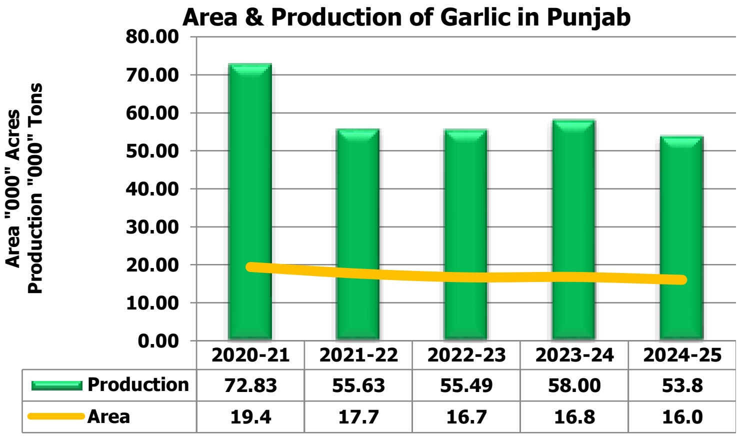
	United States	Afghan istan	Kazakh stan	UAE	Mauriti us	UK	Viet Nam
Qty.	663	875	234	103	29	55	112
Export Value	383	88	33	29	27	26	23

**=Export during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

PROVINCIAL OVERVIEW

Area & Production:

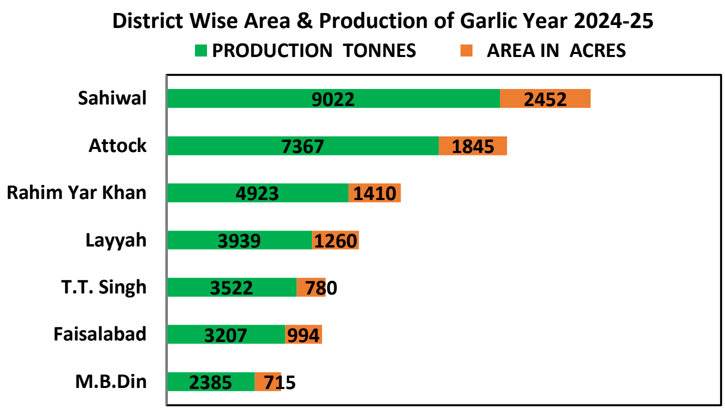
- Over the past four years, both the cultivation and production of garlic in Punjab have demonstrated a trend of stability.
- In the year 2024-25, area under garlic cultivation in Punjab was recorded at 16,100 acres, marking a 4.7% annual decrease and a 17.52% drop from the acreage recorded in year 2020-21.
- Garlic production in the province reached 53,800 tons, which have shown a 7.2% reduction from the prior year and a 26.1% decline compared to the output levels of year 2020-21.



	2020-21	2021-22	2022-23	2023-24	2024-25
Production	72.83	55.63	55.49	58.00	53.8
Area	19.4	17.7	16.7	16.8	16.0

Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

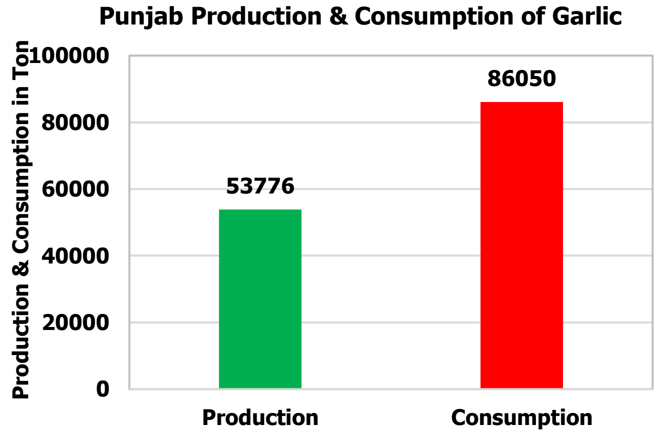
- The major garlic-producing districts in Punjab are Sahiwal, Attock, Rahim Yar Khan, Layyah, Toba Tek Singh, Faisalabad and Mandi Bahauddin. Sahiwal appears to be biggest garlic-producing district, achieving an output of 9,022 tons from a cultivated area of 2,452 acres.



Source: Crop Reporting Service Punjab

Provincial Production & Consumption:

- Duirng year 2024-25, provincial production of garlic has been recorded at 53,776 tons and provincial consumption requriment is estimated at 86,050 tons, which resulted in supply defict of 32,274 tons.



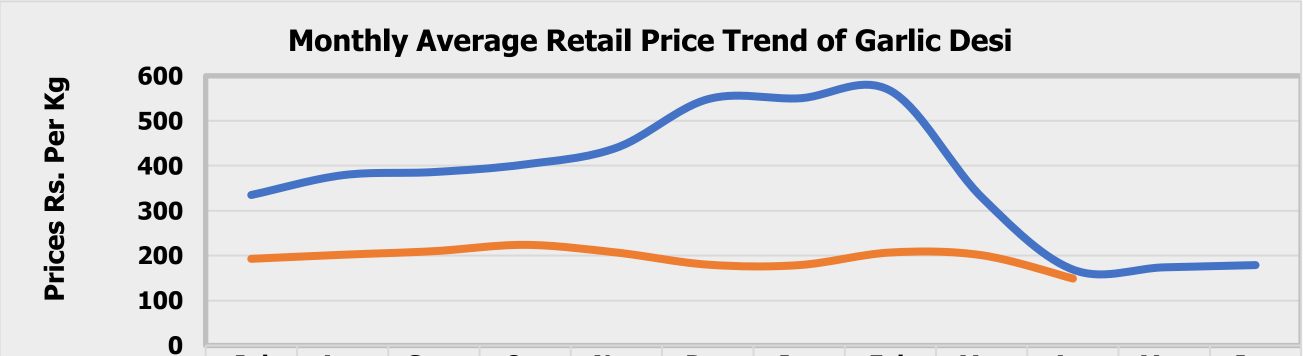
Source: Crop Reporting Service Punjab & Agricultural Statistics of Pakistan

Supply Cycle:

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

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

- **Market Prices:**
  Due to availability of local crop, supply situation of garlic is stable and its prices are on lower side in local markets. Monthly average retail price of garlic in Punjab is Rs.150/Kg during month of April. The graph of monthly average retail price of garlic is given as under:



	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2024-25	335	379	386	403	440	548	550	567	330	169	174	179
2025-26	193	202	210	224	207	180	179	207	201	149		

SUPPLY MANAGEMENT ADVISORY

Assessment

Due to availability of local crop, supply situation of garlic has improved and resultantly its prices went on lower side in local markets. Furthermore, import from China is also in progress, which further helps to maintain stability in supply & price situation of garlic.

Forecast

As the local supply is available, thus, availability and prices of garlic are expected to remain steady in local markets. Local crop will remain available in significant quantum up to July, 2026

Advisory

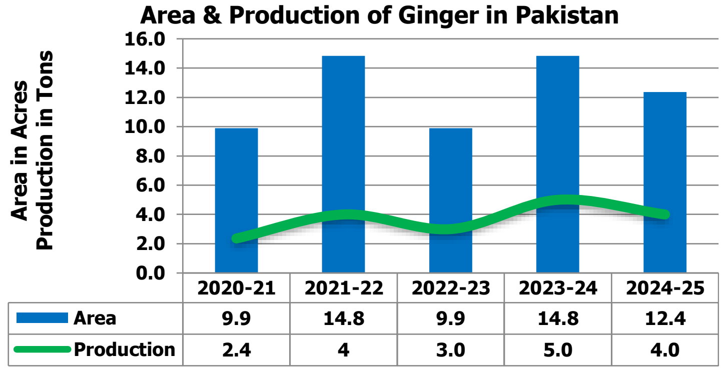
- The District Administration, in coordination with concerned EADA (E&M) and Secretaries Market Committee, should closely watch garlic supply and price situation and ensure uninterrupted availability in local markets.
- EADA (E&M) and Market Committee Secretaries consistently oversee garlic auctioning in Agricultural Produce Markets to ensure a fair price fixation process and the strict enforcement of official wholesale rates within Agricultural Produce Markets.
- To stabilize availability and maintain affordable prices year-round, the processing of garlic into paste should be actively encouraged.

5. GINGER

NATIONAL OVERVIEW

Domestic Area & Production

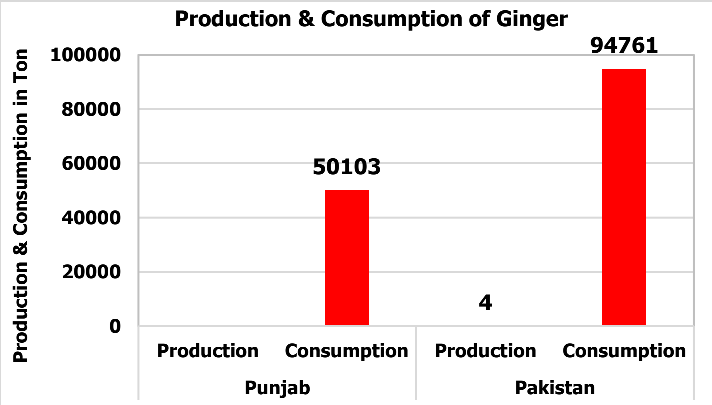
- Due to negligible domestic production, Pakistan is almost completely reliant on foreign imports to satisfy its ginger consumption requirements.
- In the 2024-25 year, domestic ginger production reached only 4 tons from a cultivated area of 12,400 acres.



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

Domestic Production & Consumption:

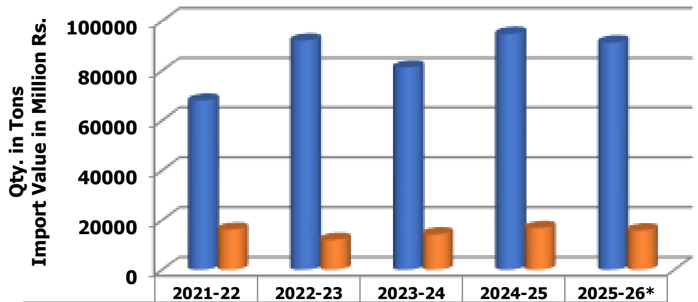
- The domestic production of ginger is recorded at only 4 tons, whereas domestic consumption requriment is estimated at 94,761 tons and consumption requirment of ginger in Punjab is 50,103 tons.



Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics

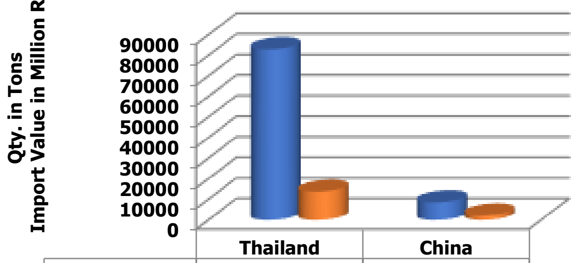
Import Insights

- Throughout the 2024-25 year, ginger imports totaled 94,761 tons, representing an expenditure of Rs. 16,707 million. During the 2025-26 period (July–March), import volumes arrived at 91,359 tons at a cost of Rs. 15,771 million, with Thailand and China serving as the primary suppliers.
- During Year 2025-26 (July–March), imports from Thailand reached 82,919 tons, costing Rs. 13,648 million, while ginger imports from China stood at 8,439 tons with a total value of Rs. 2,123 million.



	2021-22	2022-23	2023-24	2024-25	2025-26*
Qty.	68026	92084	81237	94761	91359
Import Value	16075	12024	14217	16707	15771

**=Import during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

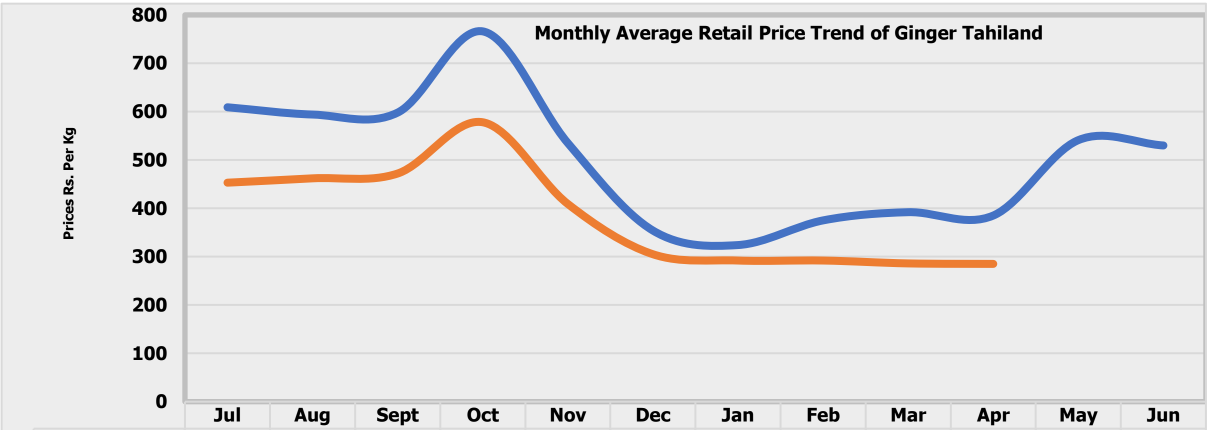


	Thailand	China
Qty.	82919	8439
Import Value	13648	2123

**=Import during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics

Market Prices

- Due to smooth import of ginger from Thailand, its supply & price situation is quite stable in local markets. The average monthly retail price of Thai ginger during month of April 2026 is recorded at Rs. 285/Kg. Trend lines for monthly average retail prices of Ginger Thai for current year and last year are outlined below:



	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2024-25	609	594	598	766	535	354	324	375	392	385	541	530
2025-26	453	462	472	578	409	305	292	292	286	285		

SUPPLY MANAGEMENT ADVISORY

Assessment

As domestic ginger production remains insignificant, thus domestic consumption demands are fulfilled through imports from Thailand and China. Currently, import from Thailand is smooth & steady, thus supply & prices of ginger are stable in local markets.

Forecast

The production season for ginger in Thailand is approaching its end, which may cause minor supply constraints and a corresponding rise in ginger prices within local markets.

Advisory

- EADAs (E&M) and Secretaries Market Committee should maintain vigilant oversight of ginger supply and price situation and ensure uninterrupted flow of the commodity into Agricultural Produce Markets with the help of importers and commission agents.
- To sustain consistent availability and stabilize prices throughout the year, the processing of ginger into paste should be actively promoted.
- It is imperative that the Agriculture Department should conduct fast-track research focused on domestic production of ginger to diminish the dependence on foreign imports and alleviate the resulting financial strain on the economy.

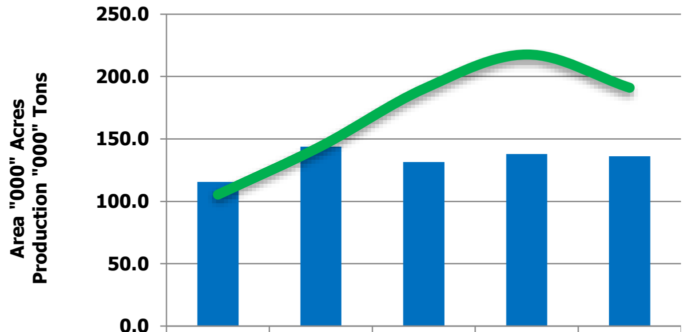
6. CHILLIES

NATIONAL OVERVIEW

Domestic Area & Production

- Over the last three years, the area dedicated to chili cultivation in Pakistan has remained stable. While domestic production showed a consistent upward trend from year 2020-21 to year 2023-24, but a minor reduction was observed during the 2024-25 year.
- In the 2024-25 year, the cultivated area was recorded at 136,100 acres, maintaining the stable pattern seen in previous periods. Domestic chili production reached 191,100 tons, which represents a 12.21% decline when compared to the production levels of the preceding year.

Area & Production of Chili in Pakistan



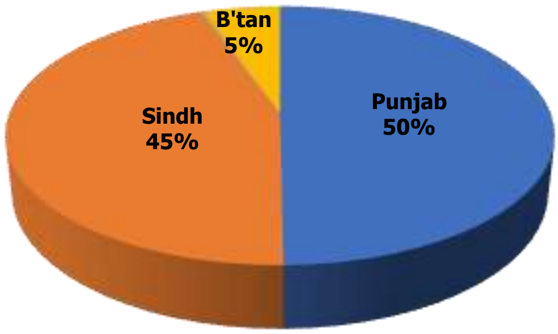
	2020-21	2021-22	2022-23	2023-24	2024-25
Area	115.7	143.7	131.4	137.9	136.1
Production	105.4	144.2	190.2	217.7	191.1

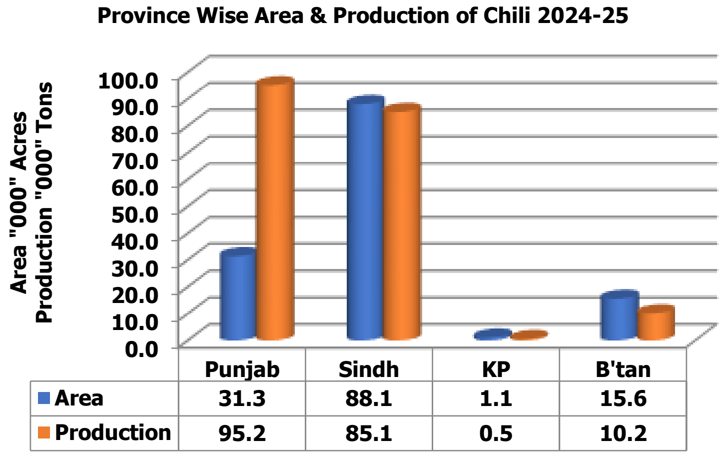
Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Province wise Area & Production

- Punjab maintains a dominant position in national chili production, contributing 50% of the country's total output. Sindh follows closely with a 45% share, while Balochistan accounts for the remaining 5%. In contrast, chili production in Khyber Pakhtunkhwa is almost non-existent.

Province Wise Production Share of Chilli 2024-25



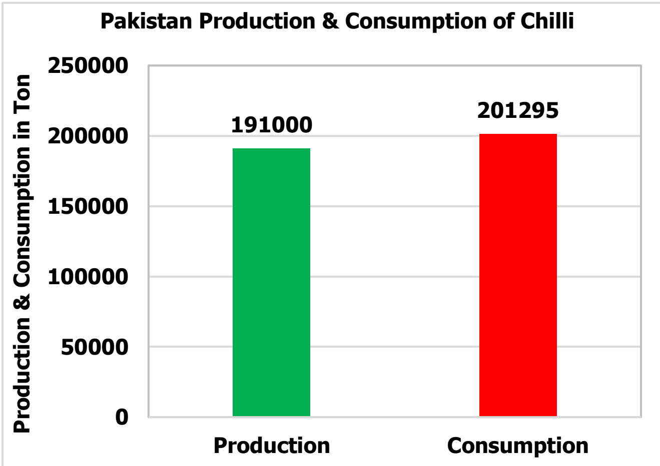


Source:Agricultural Statistics of Pakistan

- Punjab emerged as the leading chili-producing province in the 2024-25 year, achieving a production of 95,200 tons from 31,300 acres of cultivated land. Sindh ranked second, with a production of 85,100 tons spanning 88,100 acres.
- Meanwhile, chili production in Balochistan and Khyber Pakhtunkhwa remained minimal, with outputs recorded at 10,200 tons and 500 tons, respectively...

Domestic Production & Consumption:

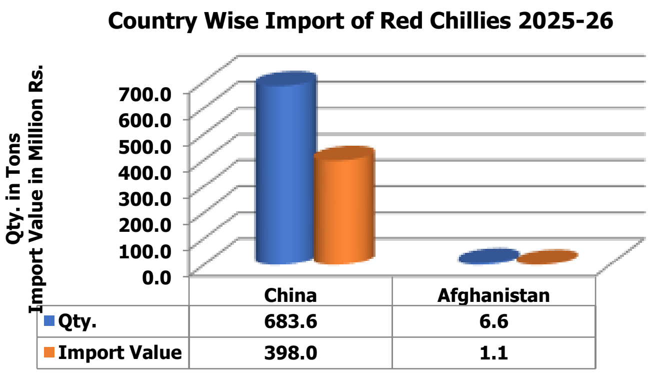
- During year 2024-25, domestic chili production amounted to 1,91,000 tons, which remained below the consumption requirement of 201,295 tons, resulting in a deficit of 10,295 tons.



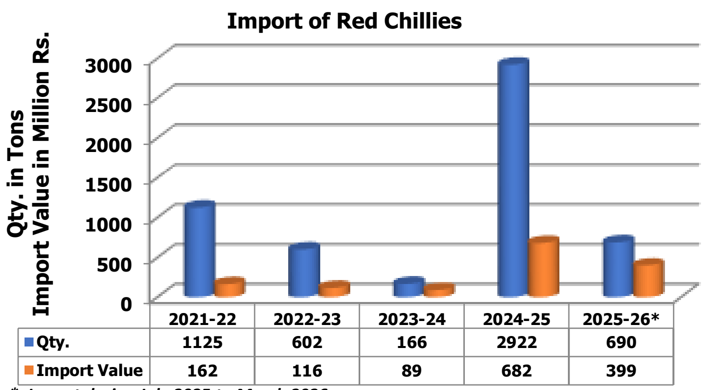
Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Import Insights

- In the 2024-25 year, Pakistan recorded red chili imports of 2,922 tons, representing an expenditure of Rs. 682 million. During year 2025-26 (July-March), imports reached 690 tons, with the associated cost amounting to Rs. 399 million.
- China remains the primary source of red chili imports for Pakistan. During the 2025-26 year (July-March), imports from China totaled 684 tons at a cost of Rs. 398 million, while only 6.6 tons were imported from Afghanistan, costing Rs. 1.1 million.



**=Import during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

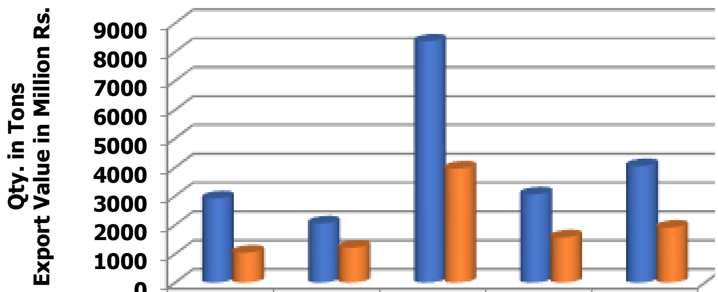


**=Import during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

Export Insights

- Pakistan's red chili exports have consistently outperformed imports in both volume and value. During the 2024-25 year, export volumes reached 3,051 tons, generating revenue of Rs. 1,574 million. During year 2025-26 (July-March), red chilies exports recorded at 4,045 tons , yielding foreign exchange earnings of Rs. 1,908 million.
- The primary destinations for Pakistani red chili exports include China, the United Arab Emirates, Saudi Arabia, Senegal, Iraq, and Oman.

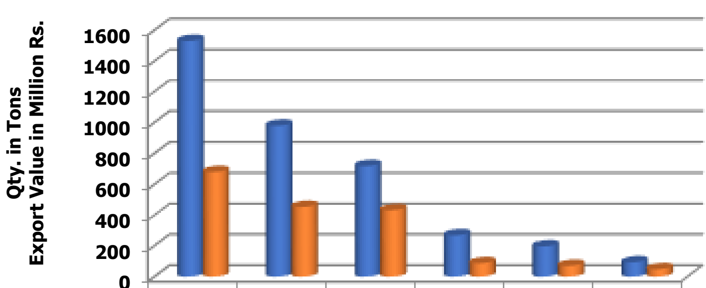
Export of Red Chillies



	2021-22	2022-23	2023-24	2024-25	2025-26*
Qty.	2913	2053	8367	3051	4045
Export Value	1046	1215	3960	1574	1908

**=Export during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

Country Wise Export of Red Chilli 2025-26



	China	UAE	Saudi Arabia	Senegal	Iraq	Oman
Qty.	1529	978	718	267	195	93
Export Value	679	453	432	86	69	47

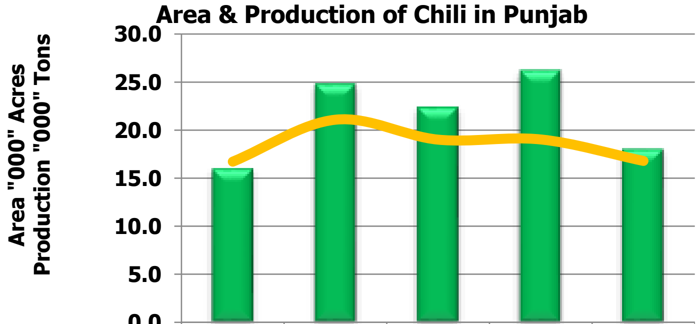
**=Export during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

PROVINCIAL OVERVIEW

Area & Production

- Over the last five years, chili cultivation and production in Punjab have witnessed fluctuations. For the 2024-25 year, the land area dedicated to chili cultivation decreased to 16,800 acres, which is an 11.75% reduction from the year before. Similarly, chili production in the province fell to 18,000 tons, representing a 31.48% decline compared to the prior year.
- The primary chili-producing districts within Punjab are Lodhran, Multan, Rajanpur, Bahawalpur, Muzaffargarh, Vehari, and Rahim Yar Khan.

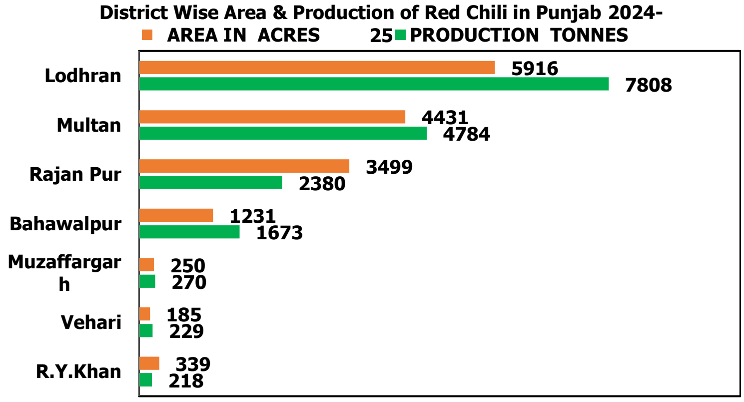
Area & Production of Chili in Punjab



	2020-21	2021-22	2022-23	2023-24	2024-25
Production	16.0	24.9	22.4	26.3	18.0
Area	16.7	21.1	19.0	19.0	16.8

Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

District Wise Area & Production of Red Chili in Punjab 2024-25

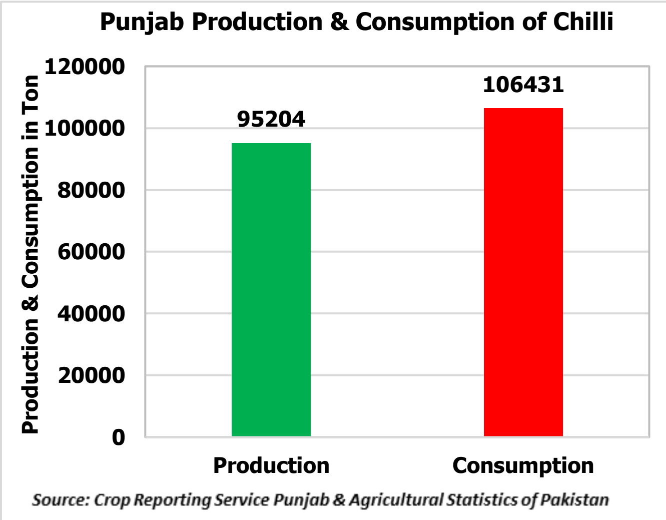


Source: Crop Reporting Service Punjab

- Lodhran appeared as highest red chili producing district by attaining production of 7,808 tons harvested from 5,916 acres, Multan stood second with production of 4,784 tons and Rajanpur ranked third, producing 2,380 tons.

Provincial Production & Consumption:

- Provincial chili production during year 2024-25 was recorded at 95,204 tons, falling short of the consumption requirement of 106,431 tons and resulting in a deficit of 11,227 tons.



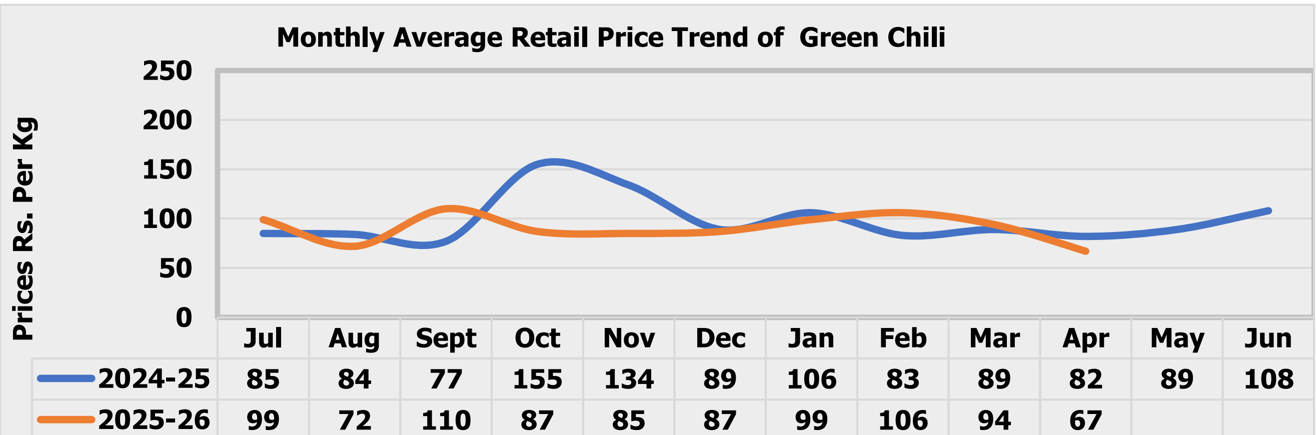
Supply Cycle

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

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

Market Prices

- Local supply of green chilies is available, resultantly its price is showing declining trend in local markets. In April, the average retail price of green chilies in Punjab was recorded at Rs. 67 per kilogram. The graphical trend of monthly average retail prices of green chilies in Punjab is illustrated below:



SUPPLY MANAGEMENT ADVISORY

Assessment

Punjab accounts for a 50% share of the domestic production of green chilies. With the availability of local supply, both the supply and price situation of green chilies are experiencing a declining trend in local markets.

Forecast

As a results of availability of local supply, supply & price situation of green chilies is anticipated to be normal in local markets.

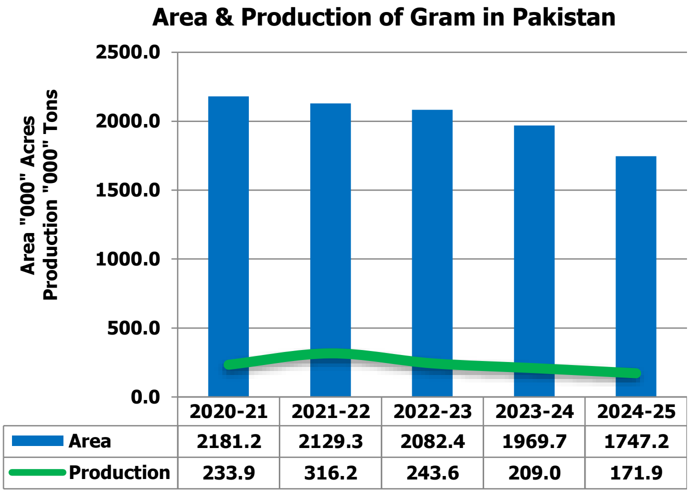
Advisory

- As local production season is in progress, therefore EADAs (E&M) and Secretaries Market Committee should regularly monitor the auction proceedings of green chilies in Agricultural Produce Markets and ensure its price fixation in a transparent manner.
- Public awareness initiatives for the kitchen gardening of chilies should be promoted to reduce the burden on the markets.
- The Agriculture Department should accelerate research efforts dedicated to the development and promotion of high-yielding, climate-resilient, and off-season seed varieties to improve self-sufficiency and reduce inter-provincial dependence.

7. GRAM (Chickpea)

NATIONAL OVERVIEW

Domestic Area & Production:

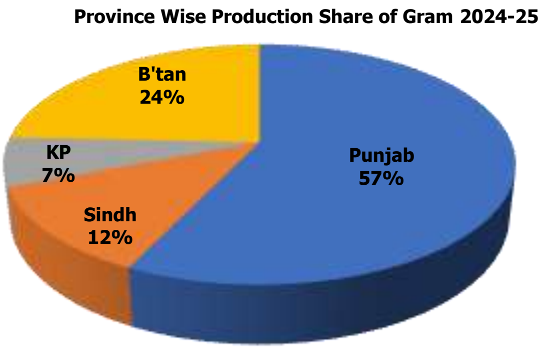


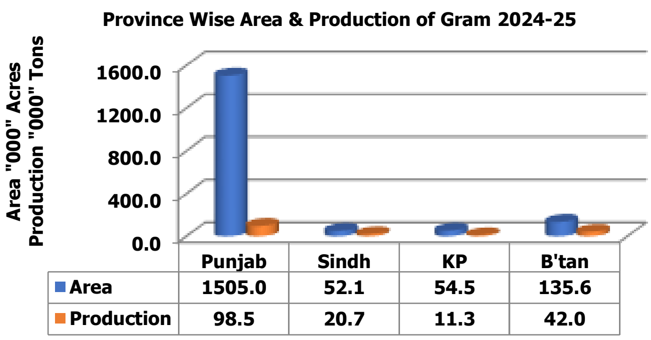
Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

- The land area dedicated to gram cultivation across the country has seen a gradual decline, resulting in a parallel drop in domestic production that falls significantly short of national consumption needs.
- During the 2024-25 year, gram was grown on 1,747,200 acres, which reflects an 11.2% decrease in acreage compared to the previous year.
- Correspondingly, domestic gram production decreased to 171,941 tons in the 2024-25 year, marking a 17.7% decline from the output levels of the prior year..

Province wise Area & Production:

- Punjab continues to lead the country in gram production, contributing 57% of the total output. Balochistan follows with a 24% share, while Sindh and Khyber Pakhtunkhwa account for 12% and 7%, respectively.
- For the 2024-25 year, Punjab produced 98,500 tons of gram from a cultivated area of 1,505,000 acres. During the same period, production levels in Balochistan, Sindh, and Khyber Pakhtunkhwa were recorded at 42,000 tons, 20,700 tons, and 11,300 tons, respectively.

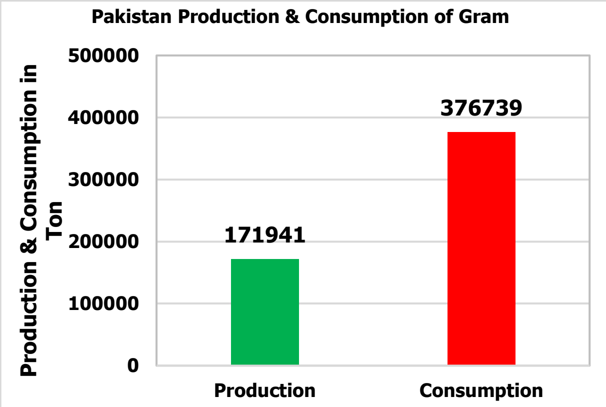




Source:Agricultural Statistics of Pakistan

Domestic Production and Consumption:

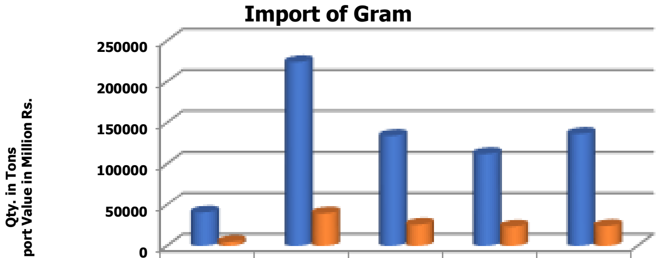
- Pakistan's insufficient domestic gram production necessitates regular imports to meet national consumption requirements. In year 2024-25, domestic production totalled 171,941 tons, falling well short of the estimated consumption demand of 3,76,739 tons, resulting in a significant supply deficit of 2,01,798 tons.



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

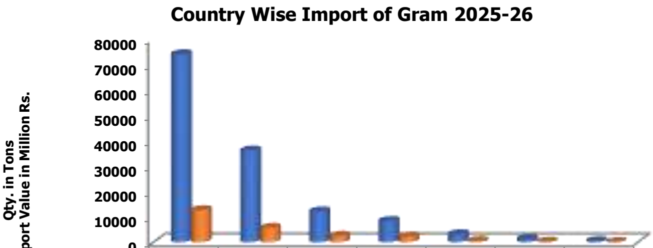
Import Insights:

- In the 2024-25 year, Pakistan recorded gram imports of 112,047 tons, totalling an expenditure of Rs. 23,458 million. This figure was surpassed during the 2025-26 period (July–March), as imports reached 1,36,496 tons with a cost of Rs. 24,159 million.
- The primary sources for Pakistan's gram imports include Australia, Russia, Canada, the USA, Tanzania, Argentina, and Ukraine.



	2021-22	2022-23	2023-24	2024-25	2025-26*
Qty.	40674	224257	134087	112047	136496
Import Value	4955	39456	25823	23458	24159

**=Import during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)



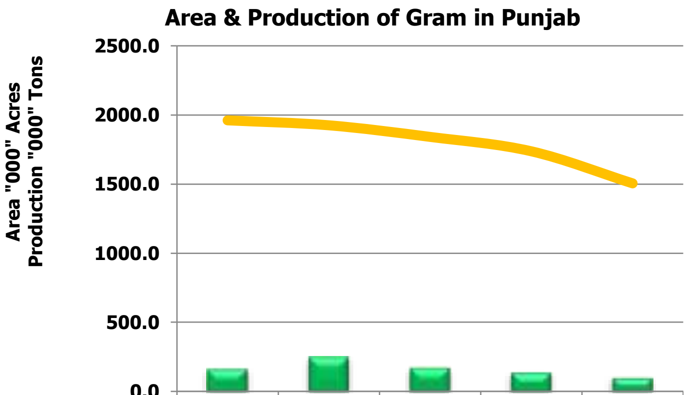
	Australia	Russia	Canada	United States	Tanzania	Argentina	Ukraine
Qty.	74294	36231	12193	8395	3167	1319	458
Import Value	12678	5699	2551	2302	553	190	88

**=Import during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

PROVINCIAL OVERVIEW

Area & Production:

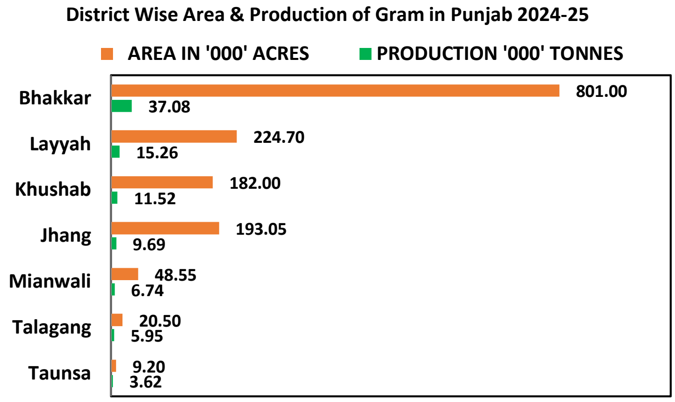
- Over the last four years, the cultivation and production of gram in Punjab have exhibited a persistent downward trend.
- In the 2024-25 year, the cultivated area for gram was recorded at 1,505,000 acres, representing a 13.35% decline compared to the previous year. Similarly, gram production within the province



	2020-21	2021-22	2022-23	2023-24	2024-25
Production	164.0	250.0	172.0	138.0	98.5
Area	1961.0	1925.0	1841.2	1737.0	1505.0

Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab reached 98,500 tons, marking a 28.6% decrease from the preceding year's production.

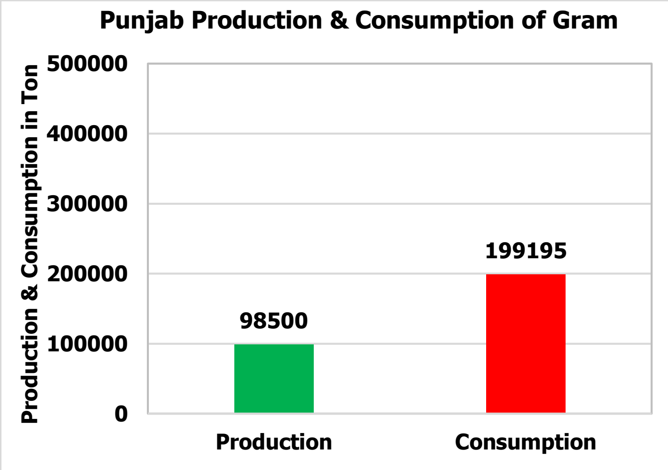
- The leading gram-producing districts in Punjab include Bhakkar, Layyah, Khushab, Jhang, Mianwali, Talagang, and Taunsa.
- Bhakkar emerged as the top producer, yielding 37,100 tons from a cultivated area of 801,000 acres.



Source: Crop Reporting Service Punjab

Provincial Production & Consumption:

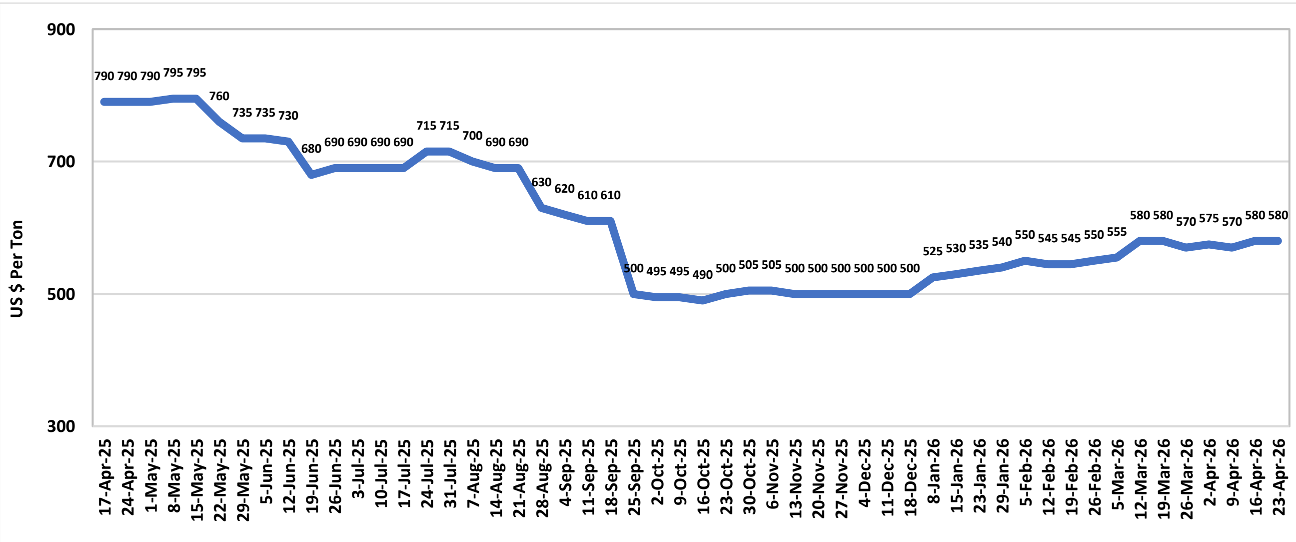
- The provincial production of gram is ecorded at 98,500 tons duirng year 2024-25, showing defict of 1,00,695 tons as compared to provincial consumption requriment i.e. 1,99,195 tons.



Source: Crop Reporting Service Punjab & Agricultural Statistics of Pakistan

International Market Trends

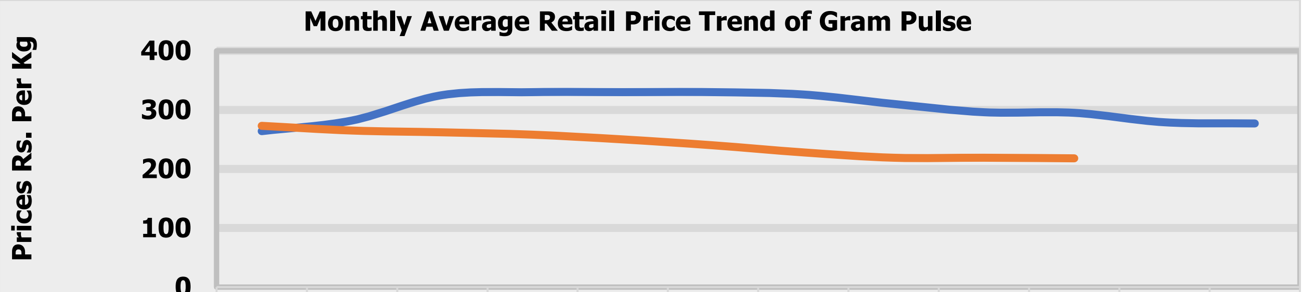
- International prices of gram have slightly increased and current international price of gram is USD 580/ton. The weekly price trends reported by the Global Pulse Confederation, is outlined below:



Source: Global Pulses Confederation

Local Market Price:

- Due to its smooth import situation, local prices of gram are showing slightly declining trend. Moreover, local production season has also commenced which will improve supply situation of gram in local markets. In Punjab, the average monthly retail price of gram pulse recorded during month of April-2026 is Rs.218, which is far less than price recorded during corresponding period of last year.



	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2024-25	264	282	325	330	330	330	326	310	296	295	279	277
2025-26	273	265	262	258	250	240	228	219	219	218		

SUPPLY MANAGEMENT ADVISORY

Assessment

Local production season of gram in Punjab has commenced and supply is on full swing. This year local production is expected to be higher than the last year. Due to availability of local crop, supply & price situation of gram is stable in local markets.

Forecast

Due to start of local production, bulk supply of gram is available in the markets. Due to availability of local crop, gram prices are likely to remain on lower side in local markets. This year, healthy crop of gram is being expected in India, which will provide cushion to its supply in international markets and resultantly international prices are likely to remain on lower side.

Advisory

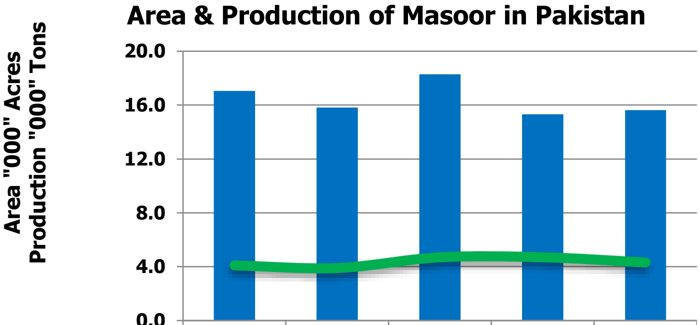
- As the local gram production season has commenced, EADAs (E&M) and Secretaries Market Committee in key producing areas i.e. Bhakkar, Khushab, Layyah and Mianwali should coordinate with local commission agents to ensure the smooth availability of the crop.
- District Administrations should take into account the arrival of the local crop and the subsequent expected decrease in gram prices during DPCC meetings.
- Price Control Magistrates should conduct regular inspections of retailers to ensure the strict implementation of notified prices.

8. LENTIL (MASOOR)

NATIONAL OVERVIEW

Domestic Area & Production:

- Pakistan's masoor (lentil) production remains extremely limited, leaving the country highly reliant on imports to satisfy domestic consumption needs. Graphical trends indicate that both production and cultivated area have stayed at very low levels and have shown instability over the past five years.
- In the 2024-25 year, the cultivated area expanded slightly to 15,600 acres, registering a 1.96% increase over the preceding year, although it remained 8.77% lower than the area recorded in 2020-21. During the same period, masoor production declined to 4,300 tons, reflecting an 8.5% reduction compared with the previous year.

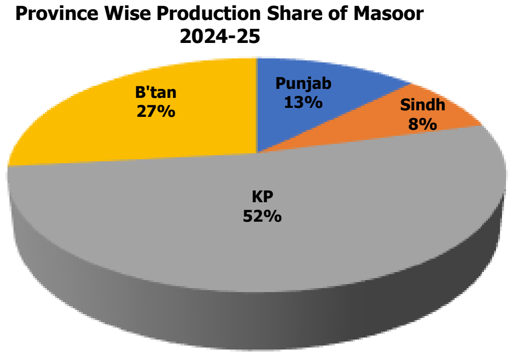


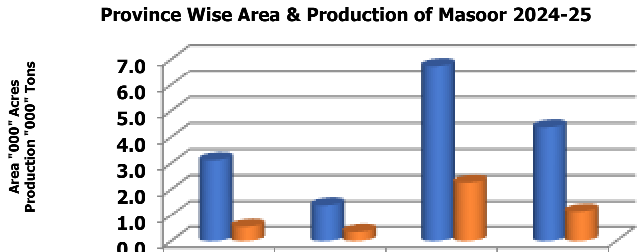
	2020-21	2021-22	2022-23	2023-24	2024-25
Area	17.1	15.8	18.3	15.3	15.6
Production	4.1	3.9	4.7	4.7	4.3

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

Province wise Area & Production:

- Khyber Pakhtunkhwa (KP) plays a dominant role in masoor production, contributing 52% of the total domestic output. Balochistan follows with a 27% share, while Punjab accounts for 13% and Sindh contributes the remaining 8%.





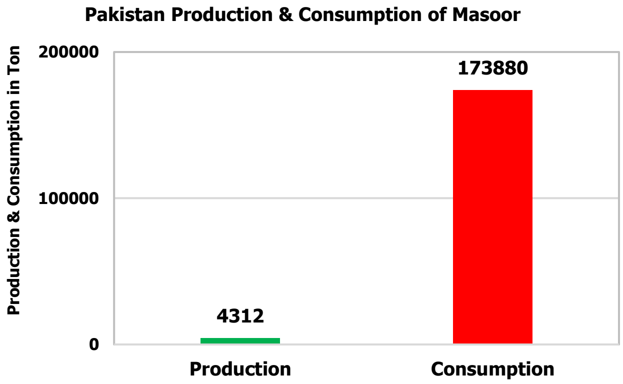
	Punjab	Sindh	KP	B'tan
Area	3.1	1.4	6.7	4.4
Production	0.5	0.3	2.3	1.2

Source:Agricultural Statistics of Pakistan

- In year 2024-25, masoor production in Khyber Pakhtunkhwa (KP) amounted to 2,300 tons harvested from 6,700 acres. Balochistan secured the second position with an output of 1,200 tons, while Punjab produced 500 tons and Sindh recorded 300 tons.

Domestic Production & Consumption

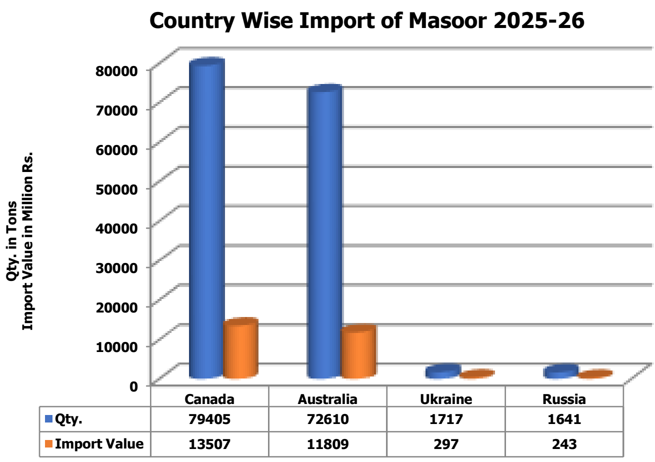
- A wide gap between production and demand was evident in year 2024-25, as domestic masoor production totaled only 4,312 tons against a national consumption requirement of 173,880 tons, resulting in a substantial deficit of 169,568 tons.



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

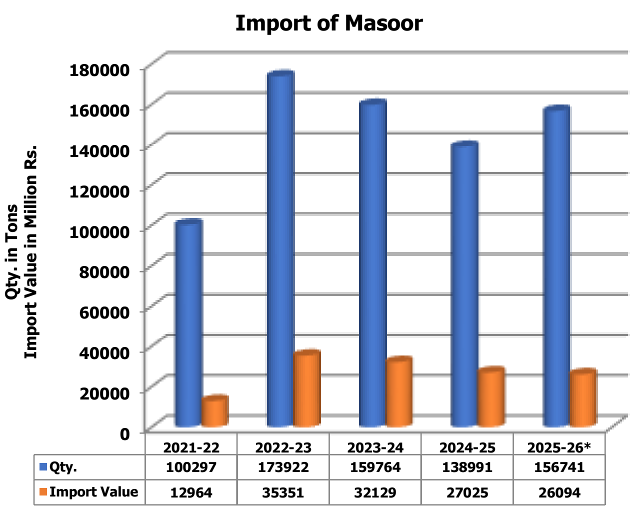
Import Insights

- To bridge the gap between domestic supply and consumption needs, Pakistan imported 138,991 tons of masoor during 2024–25 at a cost of Rs. 27,025 million, reflecting a decline in both volume and value compared to the previous year. In Year 2025–26 (July–March), masoor imports increased to 1,56,741 tons, involving an expenditure of Rs. 26,094 million.
- Masoor imports are primarily sourced from Canada, Australia, Ukraine, and Afghanistan. While Canada and Australia account for the highest import volumes, contributions from Ukraine and Afghanistan remain comparatively limited.
- During the 2025-26 year (July–March), imports from Canada totaled 79,405 tons at a cost of Rs. 13,507 million, while Australia supplied 72,610 tons valued at Rs. 11,809 million.



	Canada	Australia	Ukraine	Russia
Qty.	79405	72610	1717	1641
Import Value	13507	11809	297	243

**=Import during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)



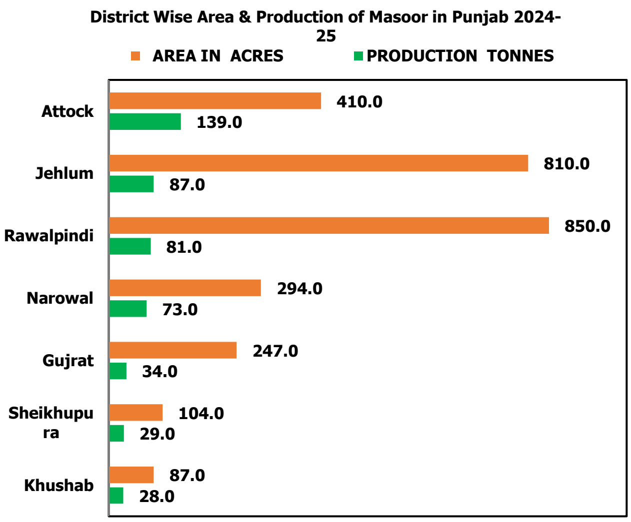
	2021-22	2022-23	2023-24	2024-25	2025-26*
Qty.	100297	173922	159764	138991	156741
Import Value	12964	35351	32129	27025	26094

**=Import during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

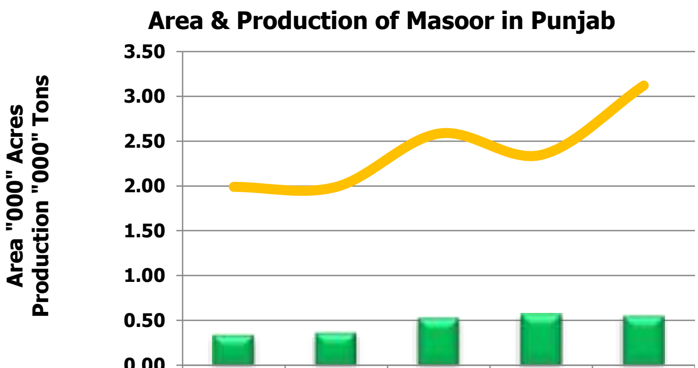
PROVINCIAL OVERVIEW

Area & Production:

- Despite a gradual expansion in both acreage and output over the past five years, masoor production in Punjab remains modest and continues to fall significantly short of provincial consumption needs.
- In the 2024-25 year, masoor production in Punjab declined to 546 tons, showing a 3.5% reduction compared with the previous year, whereas the cultivated area expanded to 3,100 acres, registering a 34.7% increase over the last year.
- Masoor cultivation in Punjab is mainly concentrated in Attock, Jhelum, Rawalpindi, Narowal, Gujrat, Sheikhupura, and Khushab, with Attock leading production at 139 tons harvested from 410 acres.



Source: Crop Reporting Service Punjab

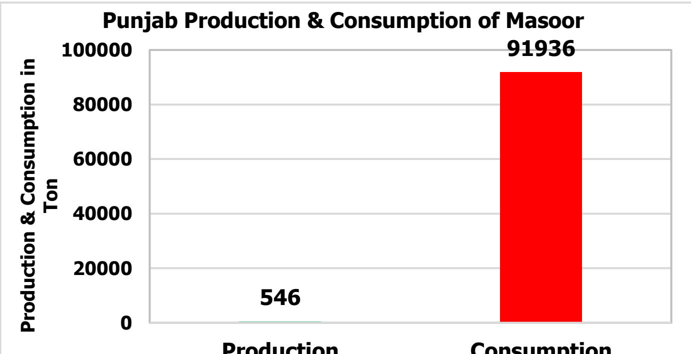


	2020-21	2021-22	2022-23	2023-24	2024-25
Production	0.34	0.36	0.52	0.57	0.55
Area	2.0	2.0	2.6	2.3	3.1

Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

Provincial Production & Consumption:

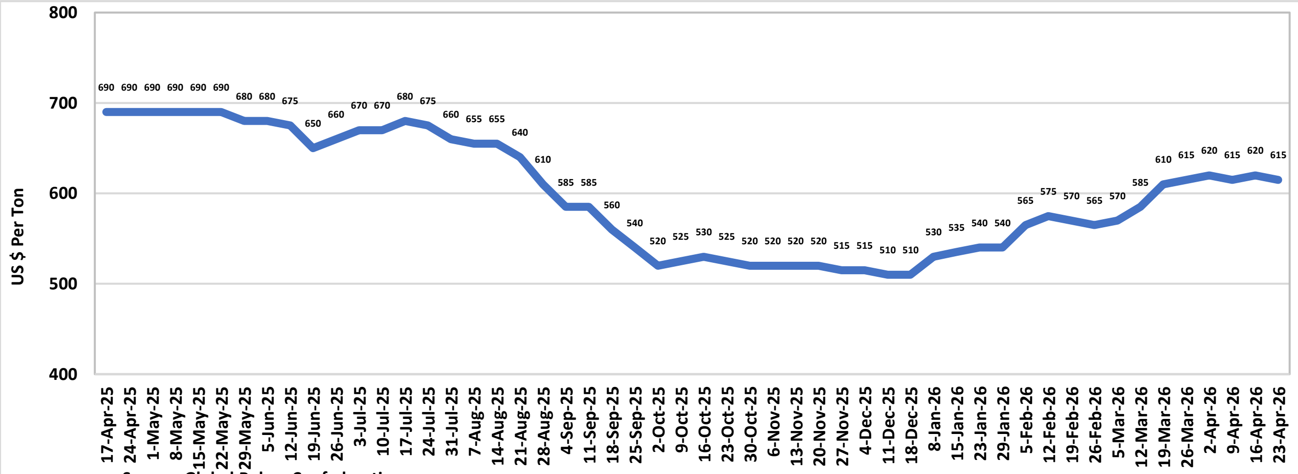
- During year 2024-25, provincial production of masoor recorded at 546 tons, falling well short of provincial consumption requriment i.e. 91,936 tons and resulted in deficit of 91,390 tons.



Source: Crop Reporting Service Punjab & Agricultural Statistics of Pakistan

International Market Trend:

International prices of masoor are showing slightly increasing trend and current international prices of maoor are USD 620/ton. The weekly trend in global masoor prices, as reported by the Global Pulse Confederation, is illustrated below:

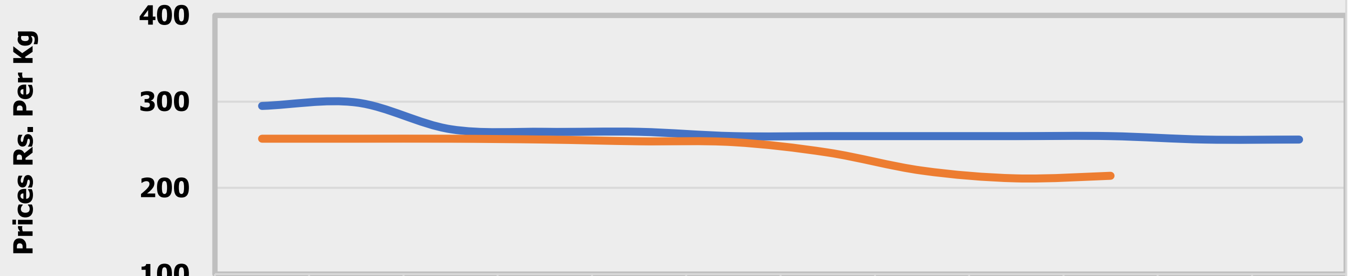


Source: Global Pulses Confederation

Local Market Price:

- Import situation of masoor remained smooth, resultantly supply & price situation of masoor is showing stable trend in local markets. In Punjab, the average monthly retail price of masoor recorded during month of April is Rs. 214/Kg.

Monthly Average Retail Price Trend of Masoor Pulse



	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2024-25	295	299	268	265	265	260	260	260	260	260	256	256
2025-26	257	257	257	256	254	253	241	220	211	214		

SUPPLY MANAGEMENT ADVISORY

Assessment

The domestic production of masoor is negligible, therefore its import is mandatory to cater for domestic consumption requirements. Import is smooth. In addition, local production season of masoor has commenced, resulatantly supply & price situation of masoor is showing stable trend in local markets. However, international prices of masoor are exhibiting slightly increaisng trend which may lead to increase in local prices as well.

Forecast

International prices of masoor are showing slightly increasing trend which may also increase prices of masoor in local markets. However, local production season has started but its impact in market will be negligible due to less production.

Advisory

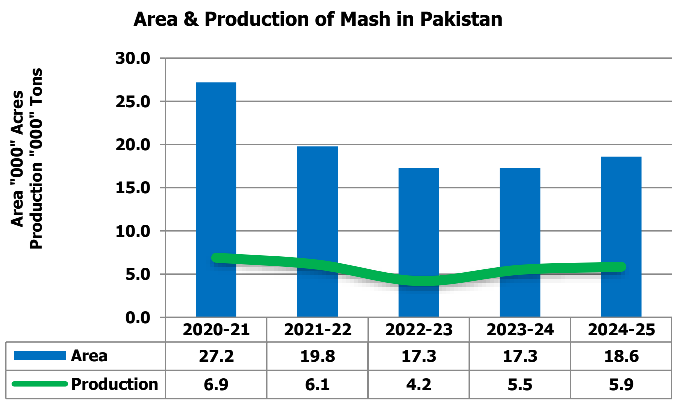
- The District Administration, in coordination with the concerned EADAs (E&M) and Secretaries Market Committee, should hold regular meetings with commission agents, importers, and dealers to evaluate the current supply status and take timely measures to maintain stability in supply & price situation of masoor.
- Stock position report should be consistently monitored and updated ensuring a steady supply of masoor.
- Price Control Magistrates should regularly monitor the retailers and take strict measures to implement notified prices within the markets.

9. MASH

NATIONALOVERVIEW

Domestic Area & Production:

- Extremely limited domestic production of mash has compelled Pakistan to rely on imports for nearly 94% of its total consumption requirements.
- A gradual upward movement in both cultivated area and production has been observed over the past three years. n year 2024-25, mash cultivation expanded to 18,600 acres, registering a



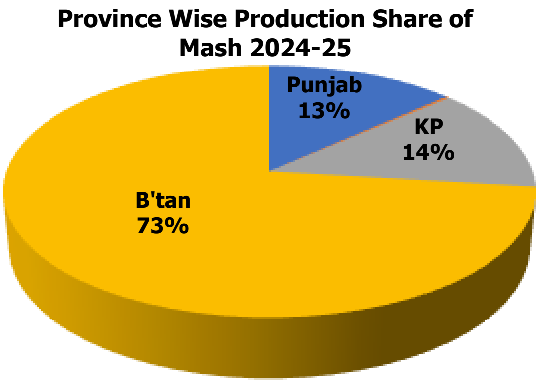
Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

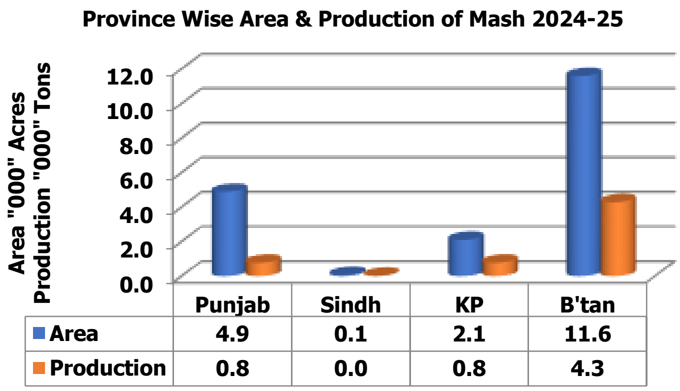
7.51% increase compared with the previous year.

- Alongside this expansion, national mash production rose to 5,850 tons, reflecting a 6.36% increase from the 5,500 tons recorded in the preceding year.

Province wise Area & Production:

- A dominant share of mash production is contributed by Balochistan, which accounts for 73% of national production of mash. Khyber Pakhtunkhwa follows with a 14% share, Punjab ranks third with 13%, while no mash production has been recorded in Sindh.
- During year 2024-25, mash output in Balochistan reached 4,300 tons, compared with 800 tons in Khyber Pakhtunkhwa and 780 tons in Punjab, whereas Sindh reported no production.

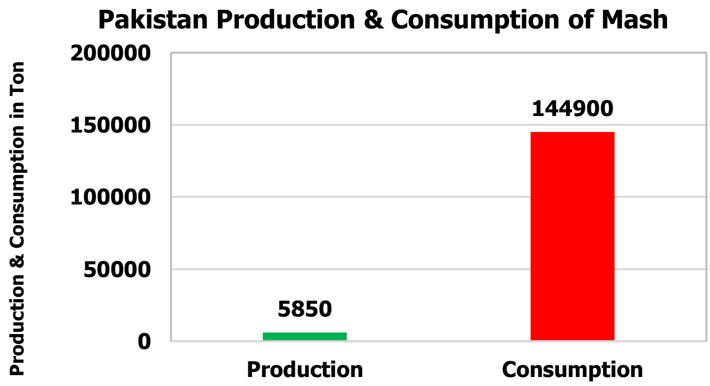




Source:Agricultural Statistics of Pakistan

Domestic Production & Consumption:

- During year 2024-25, domestic mash production was limited to just 5,850 tons, compared with a national consumption requirement of 144,900 tons, resulting in a substantial supply deficit of 139,050 tons.

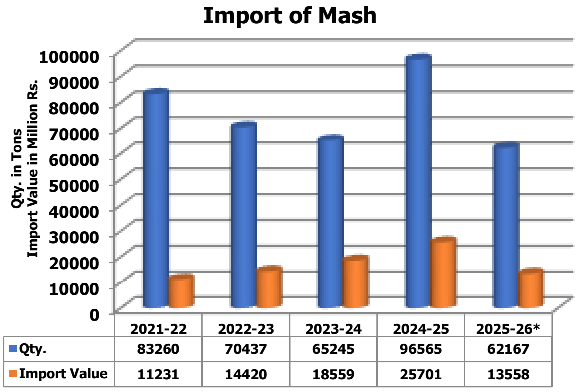


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Import Insights:

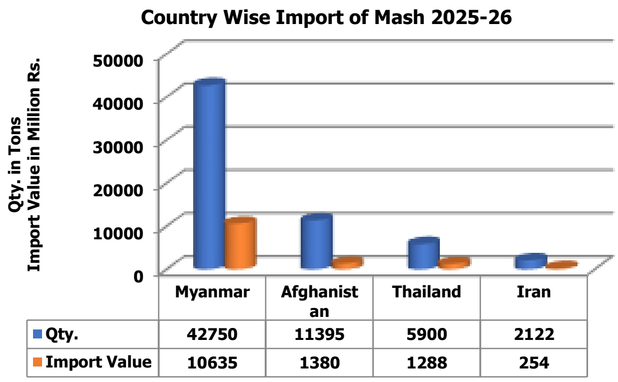
- Owing to limited domestic output, Pakistan continues to rely heavily on mash imports to meet national consumption needs. In year 2024-25, mash imports amounted to 96,565 tons, with an associated expenditure of Rs. 25,701 million. During year 2025-26 (July-March), import volumes reached 62,167 tons, incurring a cost of Rs. 13,558 million.
- The majority of mash imports are sourced from Myanmar, Afghanistan and Thailand, with Myanmar and Afghanistan serving as the principal suppliers. In year 2025-26 (July-March), imports from Myanmar totalled at 42,750 tons, 11,395 tons imported

from Afghanistan, 5,900 tons imported from Thailand and imports from Iran remained minimal at 2,122 tons



	2021-22	2022-23	2023-24	2024-25	2025-26*
Qty.	83260	70437	65245	96565	62167
Import Value	11231	14420	18559	25701	13558

**=Import during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)



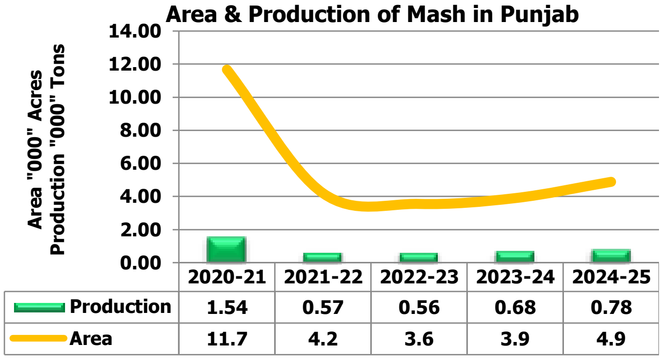
	Myanmar	Afghanistan	Thailand	Iran
Qty.	42750	11395	5900	2122
Import Value	10635	1380	1288	254

**=Import during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

PROVINCIAL OVERVIEW

Area & Production:

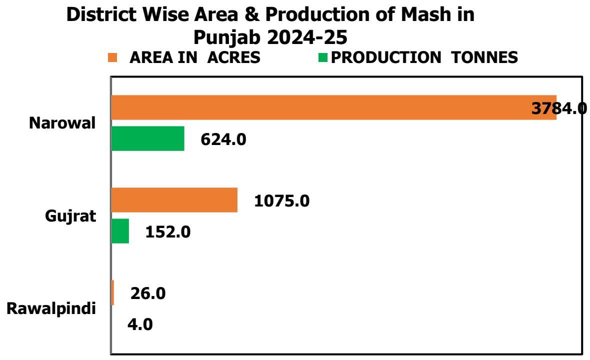
- A modest but steady improvement has been observed in Punjab's mash cultivation and production over the last three years. In year 2024-25, provincial production of mash increased to 780 tons, registering a 14.7% rise compared with the previous year, while the cultivated area expanded to 4,900 acres, reflecting a 25.6% increase over last year.



	2020-21	2021-22	2022-23	2023-24	2024-25
Production	1.54	0.57	0.56	0.68	0.78
Area	11.7	4.2	3.6	3.9	4.9

Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

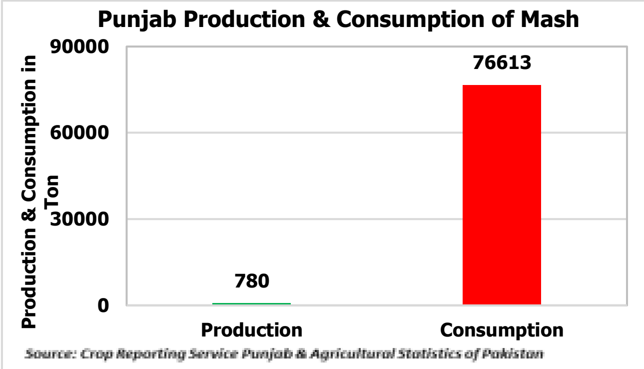
- Mash cultivation in Punjab is mainly concentrated in Narowal, Gujrat and Rawalpindi, with Narowal emerging as the leading district by producing 624 tons from 3,784 acres.



Source: Crop Reporting Service Punjab

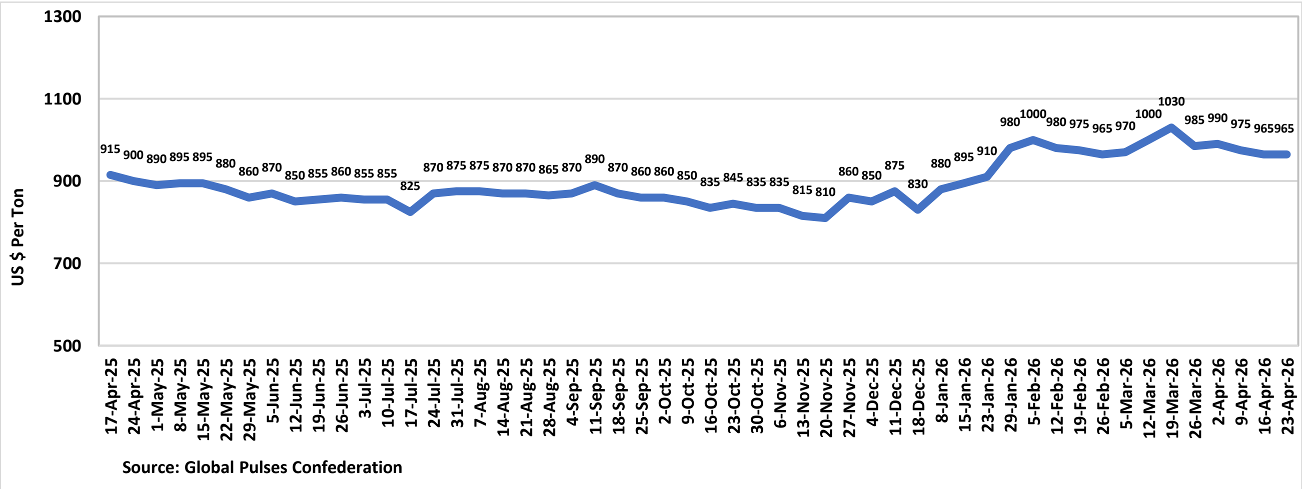
Provincial Production and Consumption:

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



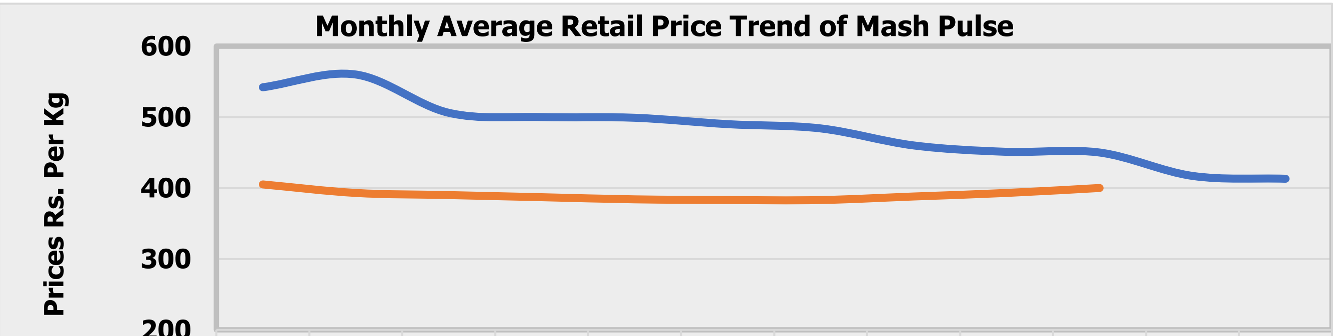
International Market Trend:

Due to start of hearvesting season of mash in Myanmar, international prices of mash are showing decreasing trend. Current international price of mash is USD 965/ton.



Local Market Price:

Local prices of mash are showing almost stable trend as aresult of its steady import situation. Monthly average retail price of mash in Punjab is recorded at Rs.400/kg during month of April-2026, which is far less than last year's price.



	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2024-25	542	560	506	500	499	490	484	460	451	450	417	413
2025-26	405	393	390	387	384	383	383	388	393	400		

SUPPLY MANAGEMENT ADVISORY

Assessment

As a result of negligible domestic production, import of mash is crucial to meet domestic consumption needs. Import situation of mash is smooth, resultantly its supply and price situation is stable in local markets. However, production season in Myanmar has begun, resultantly its international prices are declining, and this decrease may be transmitted in local prices as well.

Forecast

International prices of mash has started to decrease due to start of its production season in Myanmar. Due to decrease in international prices, import is likely to remain smooth and decrease in local prices may also be observed.

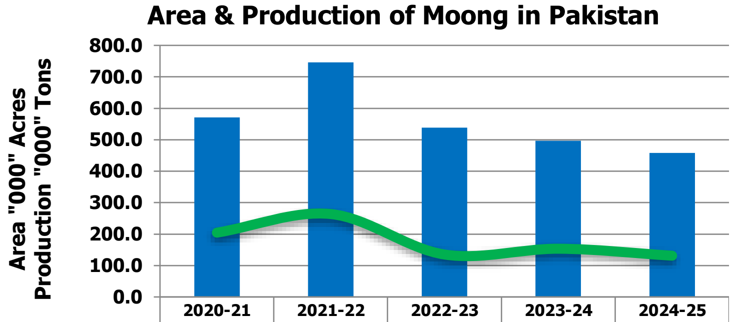
Advisory

- The District Administration, in collaboration with the concerned EADAs (E&M) and Secretaries Market Committee, should account for the falling international prices of mash due to the Myanmar production season when determining local prices during DPCC meetings.
- The District Administration should encourage importers and traders to maximize mash imports, taking advantage of the current production season in Myanmar and the anticipated further decline in global prices.
- Stock positions must be updated regularly to facilitate timely interventions that ensure stability in both the supply and prices of mash.
- Price Control Magistrates (PCMs) should take stern action against retailers found overcharging and ensure the strict enforcement of notified retail prices. A gap between open market prices and notifed retail prices is being observed which should be curtailed to minimum.

10. MOONG

Domestic Area & Production

- The domestic cultivation of moong has shown continuously declining trend over last four year and domestic production has also remained unstable even declining during this period.
- During year 2024-25, area under cultivation of moong in the country has been recorded at 4,58,200 acres, showing 7.78% decrease in contrast with preceding year.
- Likewise, domestic production of moong has appeared to be 131,200 tons during year 2024-25, showing a 14.47% decrease as compared to last year.

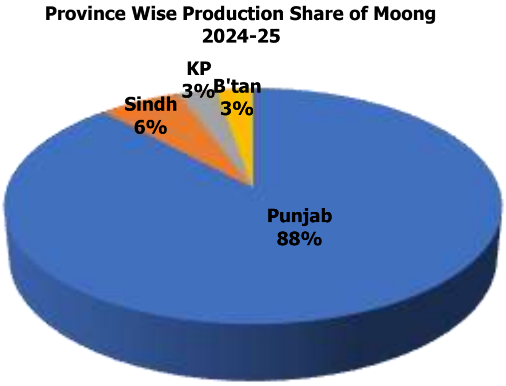


	2020-21	2021-22	2022-23	2023-24	2024-25
Area	571.1	745.8	538.5	496.9	458.2
Production	204.5	263.7	135.0	153.4	131.2

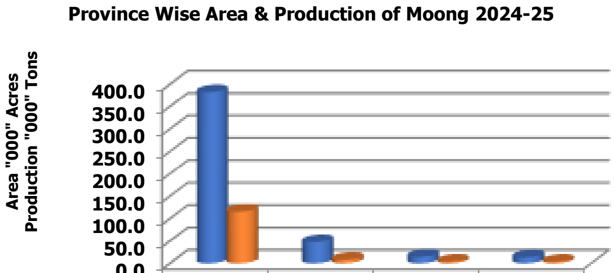
Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Province wise Area & Production:

- A dominant share of domestic production of moong was contributed by Punjab during year 2024-25, which accounted for 88% of total production. Sindh followed with a 6% share, while Balochistan and Khyber Pakhtunkhwa each contributed 3%.



- Punjab emerged as the top moong-producing province in year 2024-25, producing 115,600 tons from 382,600 acres.
- Sindh followed with 8,100 tons, Khyber Pakhtunkhwa produced 3,900 tons, and Balochistan recorded the lowest production at 3,600 tons.

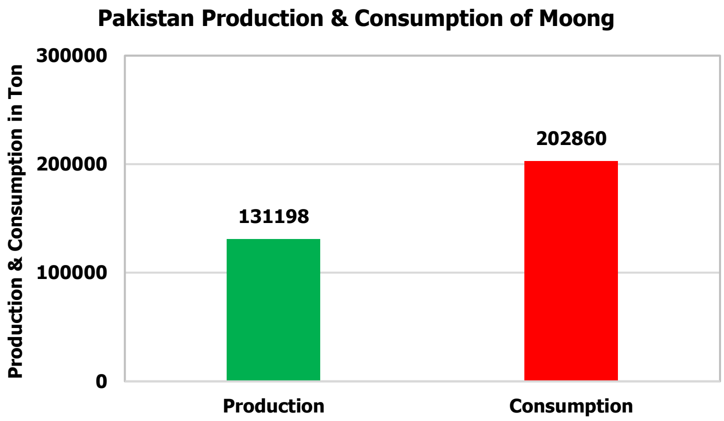


	Punjab	Sindh	KP	B'tan
Area	382.6	47.9	14.4	13.3
Production	115.6	8.1	3.9	3.6

Source:Agricultural Statistics of Pakistan

Domestic Production & Consumption:

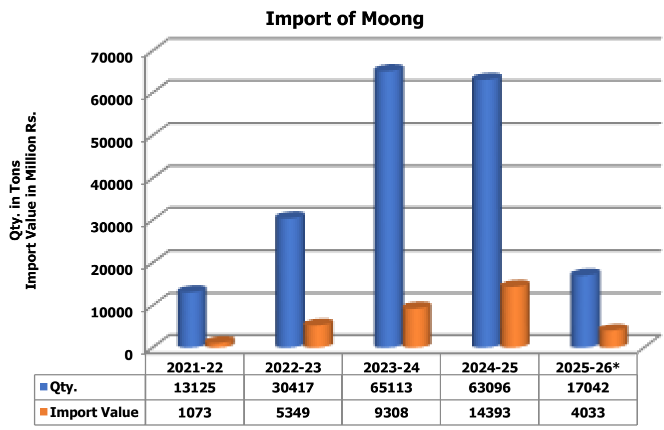
- During year 2024-25, Pakistan's domestic moong production reached 131,198 tons, falling short of the national consumption requirement of 202,860 tons and resulting in a supply deficit of 71,662 tons.



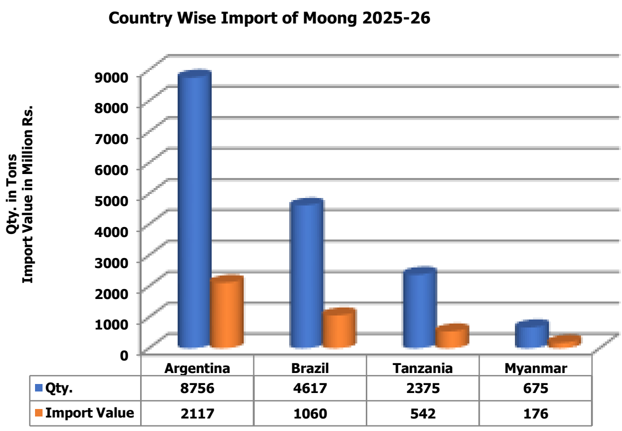
Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Import Insights:

- As a result of short supply, Pakistan remains dependent on imports to meet its domestic consumption requirements.
- In year 2024-25, Pakistan imported 63,096 tons of moong at a cost of Rs. 14,393 million. However, during year 2025-26 (July-March), imports reached 17,042 tons, at an expense of Rs. 4,033 million.
- Pakistan primarily sources moong imports from Argentina, Brazil, Tanzania, and Kenya.



**=Import during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)



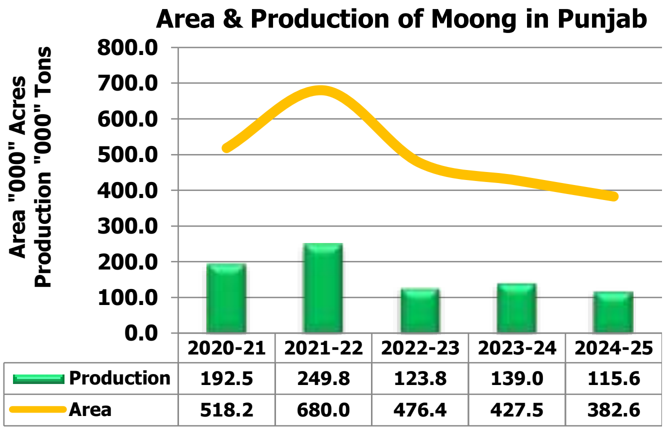
**=Import during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

PROVINCIAL OVERVIEW

Area & Production:

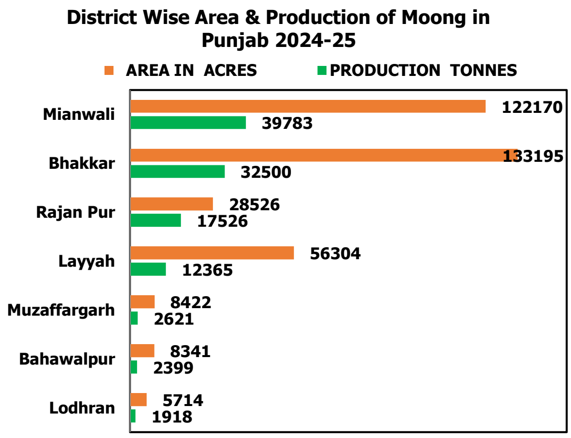
- During the last four years, cultivated area of moong in Punjab has shown declining trend and its production also remained unstable during this period.
- During year 2024-25, the cultivated area of moong in Punjab has contracted to 382,600 acres, showing a 10.5% reduction from the preceding year and its production has been recorded at 115,600 tons, reflecting a 16.8% decrease from the previous year.

- The key moong-producing districts in Punjab are Mianwali, Bhakkar, Rajanpur, Layyah, Muzaffargarh, Bahawalpur and Lodhran.



	2020-21	2021-22	2022-23	2023-24	2024-25
Production	192.5	249.8	123.8	139.0	115.6
Area	518.2	680.0	476.4	427.5	382.6

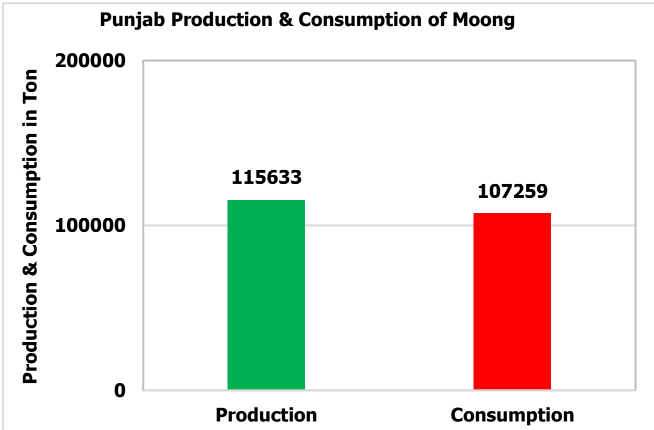
Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



Source: Crop Reporting Service Punjab

Provincial Production & Consumption:

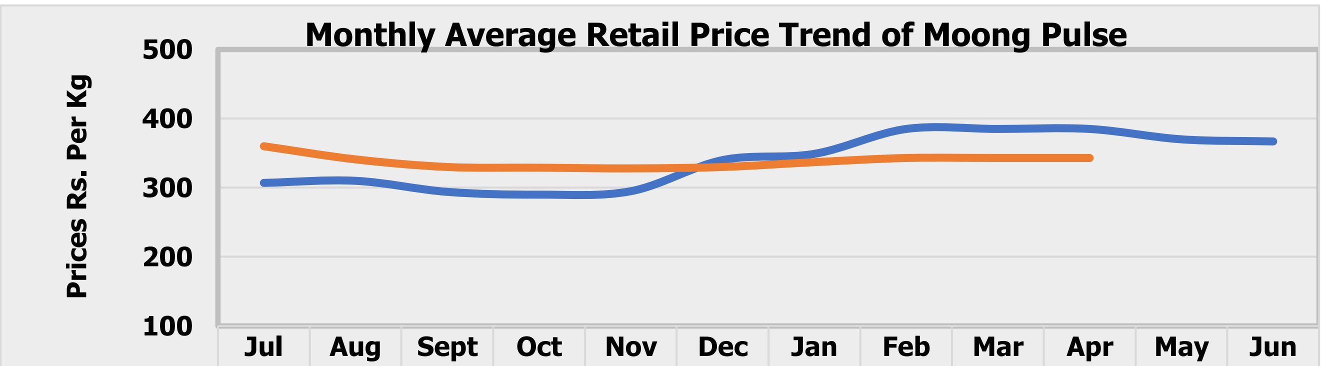
- During year 2024-25, provincial production of moong appeared to be 1,15,633 tons, showing surplus of 8374 tons as compared to provincial consumption requirement i.e. 1,07,259 tons.



Source: Crop Reporting Service Punjab & Agricultural Statistics of Pakistan

Market Prices

- Due to less local production, prices of moong remained on higher side in local markets. In April 2026, the monthly average retail price of moong in Punjab was recorded at Rs. 343 per kilogram. The trend of monthly average retail prices for moong is presented below:



	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2024-25	307	310	294	290	295	340	349	385	385	385	370	367
2025-26	360	341	330	329	328	330	337	343	343	343		

SUPPLY MANAGEMENT ADVISORY

Assessment

On account of minimal local production, supply of moong is under stress, thus its prices are on higher side in local markets. However, current prices of moong are comparatively less than prices of last year.

Forecast

Due to less local production, prices of moong are anticipated to remain on higher side in local markets. However, a minor crop of moong is expected to arrive during end May, 2026, but major crop will arrive during August, 2026, afterwards supply situation of moong will improve in local markets.

Advisory

- District Administration with the help of concerned EADA (E&M) and Secretaries Market Committees closely monitor the supply situation and arrange sufficient supply as per consumption requirements with the help of commission agents/traders.
- Price Control Magistrates should conduct vigilant monitoring of retailers and take strict actions to reduce gap between notified retail prices and open market prices.
- Agriculture Department must introduce high yielding & resistant seed varieties and should encourage farmers to enhance local production of moong as per consumption requirements.

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

GOVERNMENT OF PUNJAB

Food Safety and Consumer Protection Department

Directorate of Agriculture Economics & Marketing

Strengthening Agriculture Marketing Information Service (SAMIS) Project

Contact Number: 042-99201094