APRIL 2026

Food in Focus

Food Safety & Consumer Protection Department

REPORT HIGHLIGHTS

- Comprehessive Market Trend Analysis
- Price & Supply Forecasting
- Policy & Advisory Measures

REPORT FEATURES

Market Trends | Forecasting | Policy Advisory

PREFACE

The Food Safety and Consumer Protection Department is pleased to present the eighteenth edition of its monthly market bulletin, **"Food in Focus: Market Analysis Report."** This report offers a comprehensive review of the supply and price dynamics of essential food commodities, with detailed insights into domestic production trends, consumption patterns, import and export flows, as well as developments in global markets.

In addition, this edition puts forward strategic policy recommendations for the District Administration, Agriculture Department, and Market Committees. It emphasizes the importance of vigilant monitoring of essential commodity supplies and the adoption of proactive measures to ensure their availability at affordable prices. The report also highlights the ongoing shortfall in domestic production relative to national consumption requirements, underscoring the continued reliance on imports to bridge these gaps.

We are confident that the analytical insights and policy guidance presented in this report will support stakeholders in making informed decisions and leveraging emerging opportunities in an increasingly dynamic food market. It is our continued aim for "Food in Focus" to serve as a dependable reference and 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:** Supply of tomato is mainly arriving from production areas of Sindh i.e. Thatta, Tando Allahyar and Larkana. Thus, sufficient supply is available and prices are in normal range. Local production season of tomato is going to commence in April 2026, which will further improve supply situation. However, Federal Government has allowed export of tomato to Iran, which may increase its demand and price in local markets.
- **Onion:** Main supply of onion is arriving from Sindh, and supply from Punjab has also started. As a result of adequate supply, onion prices are stable in local markets. Local supply will increase gradually, however allowance of onion export to Iran may cause instability in supply & price situation of onion in local markets.
- **Potato:** Due to surplus availability of local production, potato prices are on very lower side, which is benefitting for consumers but potato growers experienced loss due to very lower prices. However, recent allowance of potato export to Iran, may increase demand and bring prices up to an appropriate level.
- **Garlic:** Local production season of garlic has started, which maintained stable supply & price situation of garlic in local markets. Imports from China is also in progress as a cushion to supply situation.
- **Ginger**: Domestic production of ginger is negligible, thus its consumption is entirely met through import from Thailand and China. As now production season in Thailand and China is going to end, thus import of ginger may be disturbed and its prices may increase in local markets.
- **Green chili**: Local production season has commenced. Punjab has 50% share in domestic production of green chilies, thus its supply & price situation is exhibiting stable trend in local markets.
- **Pulses:** Local production season of gram is going to start in April and its international prices also slightly declined, thus due to availability of local crop, supply & price situation of gram is stable. In case of Mash, its production season in Myanmar has commenced, resultantly its international prices have decreased, which may help to keep steady supply & price situation of mash in local markets. International prices of masoor are increasing which may cause surge in its local prices. As regards moong, its minor crop will arrive during May, 2026, which may provide some cushion to supply situation.

Advisory Measures:

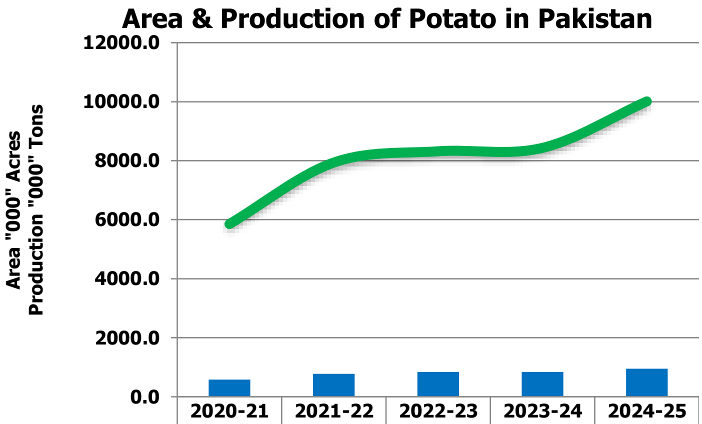
- The District Administration, in coordination with concerned EADA (E&M) and Secretaries Market Committees, should ensure effective supply chain management of essential commodities and take all necessary measures to prevent any supply disruptions especially due to start of export of essential vegetables to Iran.
- The District Administration, must consider availability of local crop of gram and decrease 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 introduce off-season seed varieties to expand the local production period of key vegetables, while also promoting high-yield pulse varieties to reduce reliance on imports. Furthermore, ginger seed varieties adapted to local agro-climatic conditions should be developed and introduced to support domestic production.

1. Potato

NATIONAL OVERVIEW

Domestic Area & Production:

- Domestic potato production is not only sufficient to meet national consumption needs but also generates a surplus. According to the Agricultural Statistics of Pakistan and the Economic Survey of Pakistan, potato production reached 10.01 million tons in 2024–25, representing a significant 18.68% increase compared to the previous year.
- Long-term trends indicate consistent growth in both the area under cultivation and total production.

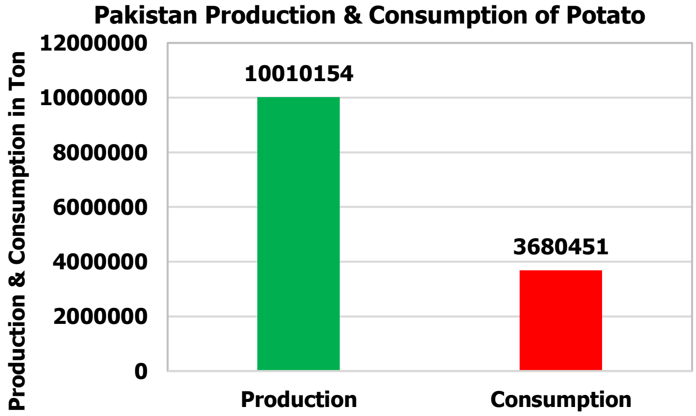


	2020-21	2021-22	2022-23	2023-24	2024-25
Area	579.1	776.2	841.6	837.0	955.5
Production	5854.2	7936.9	8319.8	8434.1	10010.2

Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics

Domestic Production & Consumption:

- The estimated annual domestic requirement for potato consumption is 3,680,451 tons, while domestic production for 2024–25 reached 10.01 million tons. This resulted in a substantial surplus of approximately 6.32 million tons.



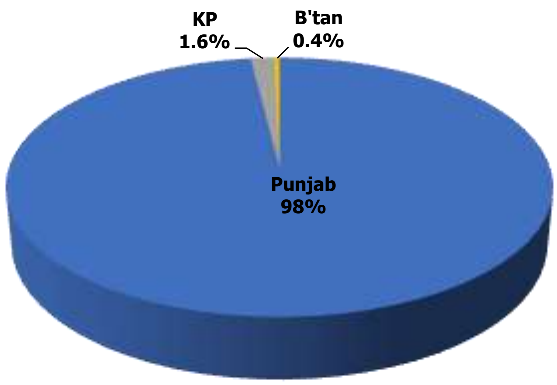
Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Province wise Area & production:

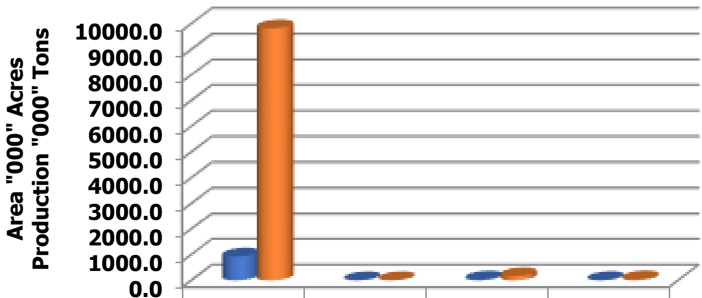
- With an overwhelming 98% share of national output, Punjab continues to be the primary hub of potato production in Pakistan. In addition to meeting its own consumption needs, the province functions as the main supplier to other regions of the country, while contributions from the remaining provinces remain comparatively minor.

- During year 2024–25, Punjab recorded a production volume of 9.812 million tons from 921,600 acres of cultivated land. In contrast, Khyber Pakhtunkhwa produced 157,700 tons, representing only 1.6% of national output. Production in Balochistan and Sindh remained comparatively low, 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



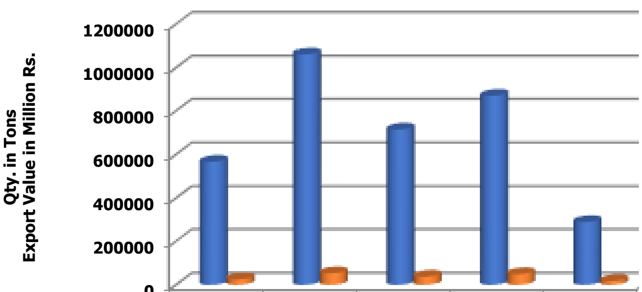
	Punjab	Sindh	KP	B'tan
Area	921.6	0.7	27.4	5.8
Production	9812.9	2.7	157.7	36.8

Source: Pakistan Bureau of Statistics (PBS)

Export Insights:

- Given its substantial potato production, Pakistan exports significant volumes each year to generate foreign exchange earnings. During the fiscal year 2024–25, potato export was recorded at 8,68,605 tons, contributing Rs. 48,905 million in export revenue. During year 2025–26 (July–February), export volumes reached 2,89,943 tons, yielding foreign exchange reserves of Rs. 17,680 million.
- Major export destinations for Pakistani potatoes included United Arab Emirates, Sri Lanka, Qatar, Afghanistan, Oman, Malaysia and Uzbekistan.

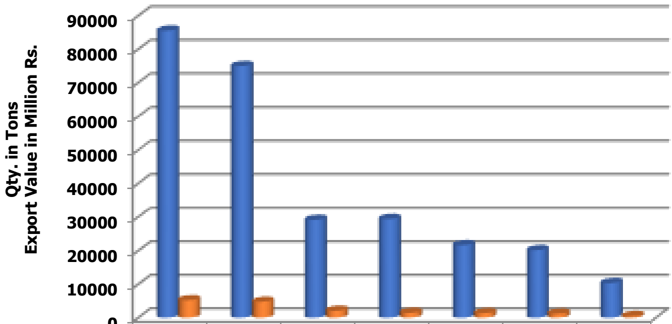
Export of Potato



	2021-22	2022-23	2023-24	2024-25	2025-26*
Qty.	566205	1060756	713951	868605	289943
Export Value	24891	52779	37386	48905	17680

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

Country Wise Export of Potato 2025-26

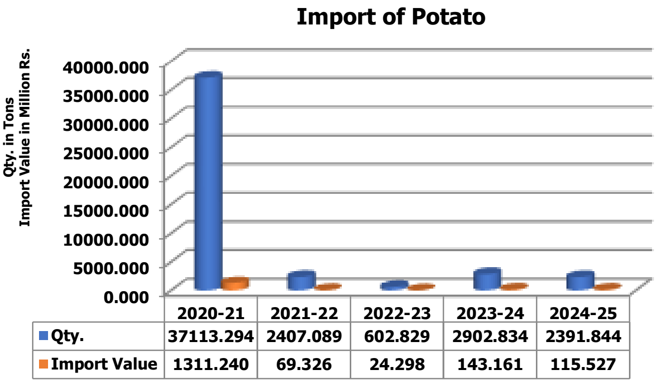


	UAE	Sri Lanka	Qatar	Afghanistan	Oman	Malaysia	Uzbekistan
Qty.	85496	75041	29119	29388	21662	20191	10341
Export Value	5281	4827	2036	1411	1325	1171	443

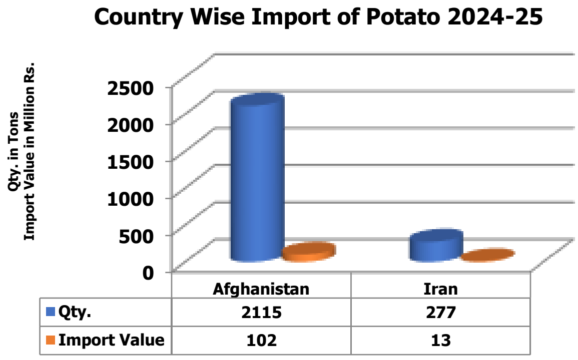
**=Export during July 2025 to February 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

Import Insights:

- Pakistan does not require potato imports for consumption due to its ample domestic production; however, limited quantities are imported exclusively for seed purposes. In year 2024–25, potato imports amounted to 2,392 tons, while no imports have been recorded thus far during year 2025–26 (July–February). Seed potato imports are primarily sourced from Afghanistan and Iran.



Source: PBS & Pakistan Single Window

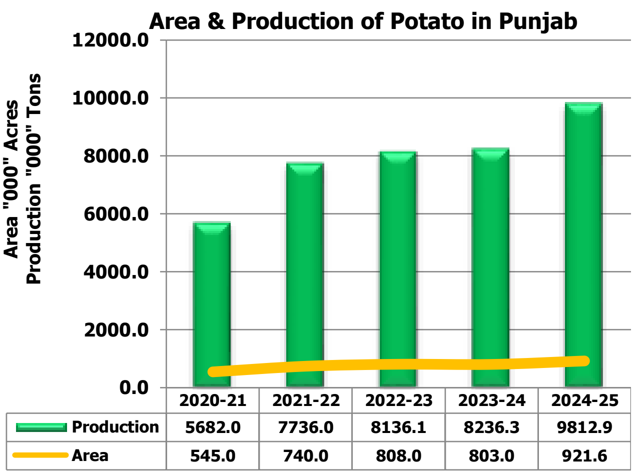


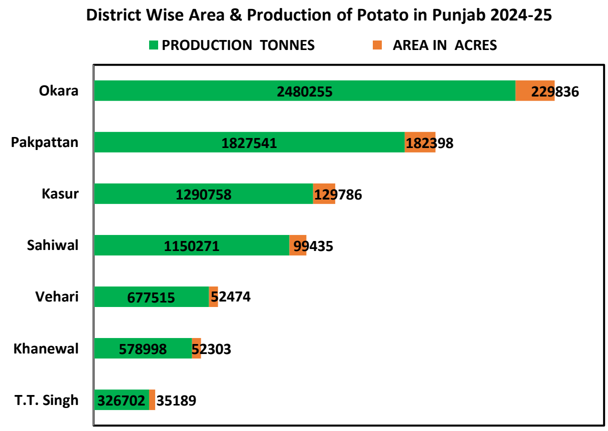
Source: Pakistan Single Window

PROVINCIAL OVERVIEW

Area & Production:

- Potato cultivation and production in the province have shown a consistent upward trend over the past five years. In 2024–25, the cultivated area reached 921,600 acres, reflecting a 14.7% increase over the previous year and a substantial 69.1% rise compared with 2020–21.
- Similarly, potato production climbed to 9.813 million tons in 2024–25, marking a 19.14% increase from the preceding year and a 72.7% improvement relative to 2020–21.
- Okara remains the leading potato-producing district, achieving an output of 2.480 million tons. Other key producing districts include Pakpattan, Kasur, Sahiwal, Vehari, Khanewal, and Toba Tek Singh..

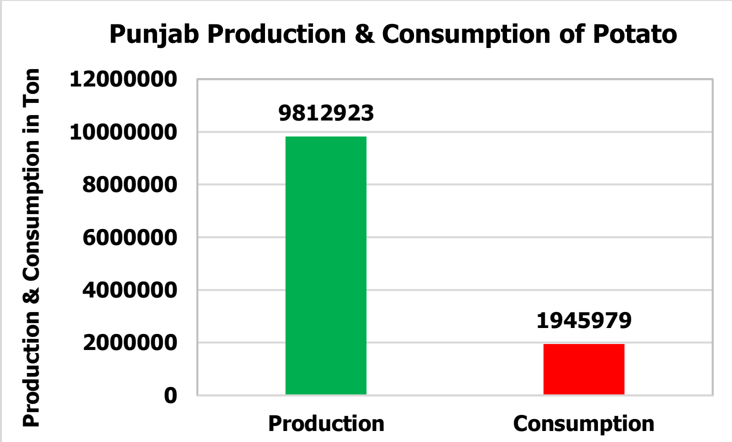




Source: Crop Reporting Service Punjab

Provincial Production & Consumption:

- In year 2024–25, Punjab's potato production reached 9.812 million tons, against an estimated provincial consumption requirement of 1.945 million tons. This resulted in a significant surplus of approximately 7.86 million tons in the province's potato supply.



Source: Crop Reporting Service Punjab & Agricultural Statistics of Pakistan

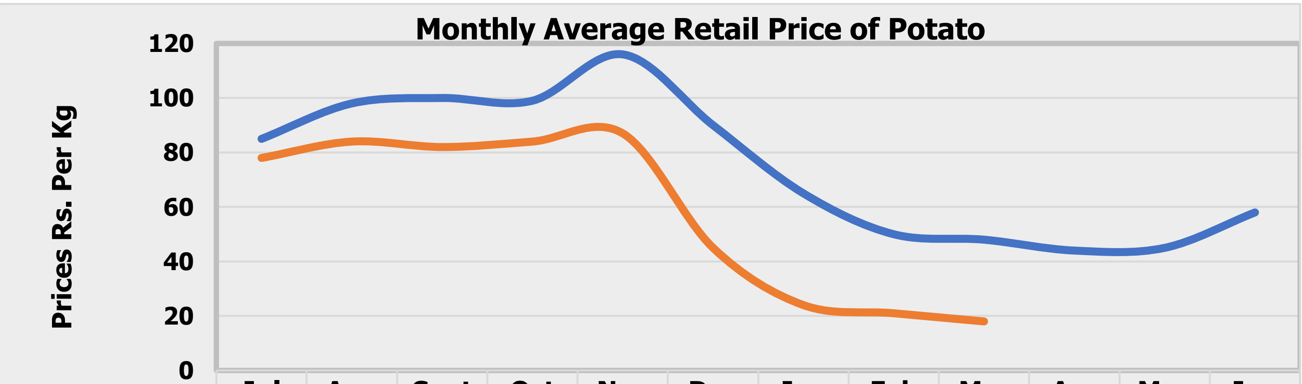
Supply Cycle:

- 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:

- Bulk supply of potato is available in the local markets due to ongoing production season of potato in the Punjab. This year record surplus production has been received from major potato producing districts i.e Okara, Pakpattan & Sahiwal. Due to availaibility of surplus supply, retail prices of fresh potato remain on very lower side in local markets. During March, the average retail price of fresh potato stood at Rs. 18 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			

SUPPLY MANAGEMENT ADVISORY

Assessment

This year, potato production in Punjab has recorded at 12.1 million tons, showing 23.4% increase over the last year as reported by Crop Reporting Service (CRS) Punjab. This substantial increase in production resulted in surplus supply keeping potato prices on lower side in lower markets. Moreover, export via Pak-Afghan border and Pak-Iran border is also disturbed due to prevailing war situation. On one side, low consumer price generated relief for consumers but on other side low producing price has accrued loss to the potato growers.

Forecast

Due to abundant availability of local crop, supply of potato is likely to remain stable with its prices on lower side. Potato export via Afghanistan & Iran was not progressing smoothly, however Federal Government has now allowed export of 10 food items including potatoes to Iran without need for financial instrument. This action may rise demand of potato and its prices are expected to come in normal range which might be benefitting for potato growers. Fresh crop of potato will remain available from dheries at fields level till May, 2026, afterwards its supply will start to arrive from local cold storages. In addition, some fresh supply of potato will also be available from KP & Balochistan during June-July.

Advisory

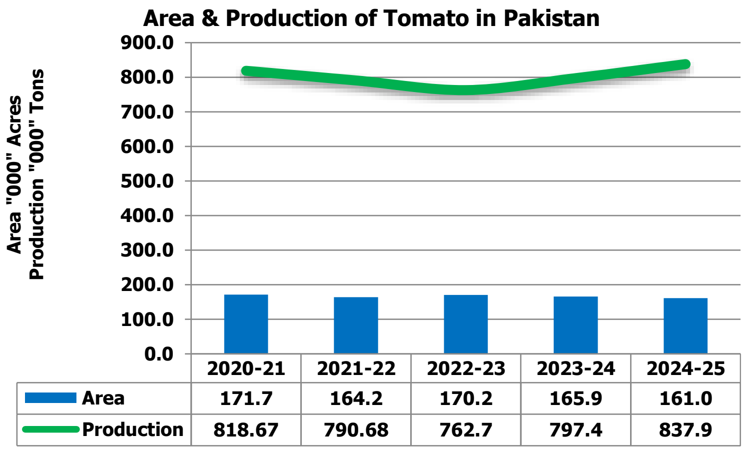
- District Administration with the help of concerned EADA (E&M) and Secretaries Market Committee should keep watching supply of potato carefully to observe expected impact on supply due to start of potato export to Iran and necessary measures may be taken accordingly.
- EADA (E&M) and Secretaries Market Committee, should regularly supervise auction proceeding in Agricultural Produce Markets and ensure price are fixed in a transparent and fair manner. In addition, notified wholesale prices be truly implemented in Agricultural Produce Markets.
- District Administration with the help of Price Control Magistrates should monitor retailers and strictly ensure notified prices in open market.

2. TOMATO

NATIONAL OVERVIEW

Domestic Area & Production:

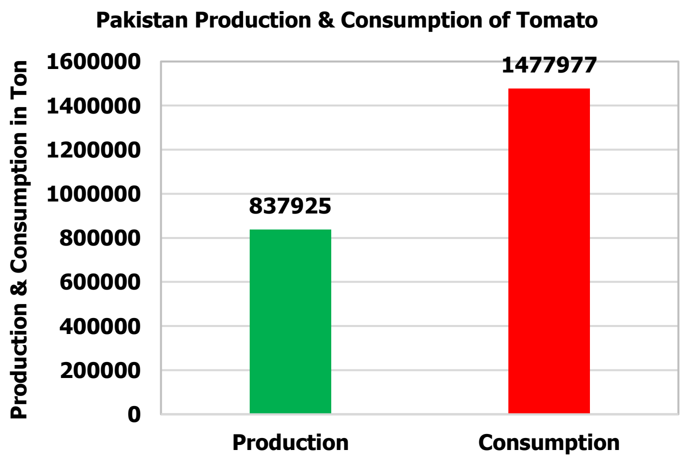
- Although the area under cultivation experienced a slight decline, domestic tomato production has maintained a steady growth trend over the past three years. In 2024–25, national tomato production reached 837,925 tons, reflecting a 5.07% increase over the previous year, while the cultivated area decreased to 161,000 acres, representing a 3.95% reduction compared with the preceding year.



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

Domestic Production & Consumption:

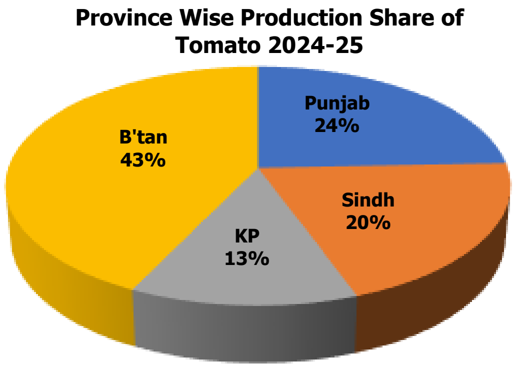
- Despite the continued increase in domestic tomato production, output remains well below the country's consumption requirements. With domestic demand estimated at 1,477,977 tons compared to production of 837,925 tons, there is an annual shortfall of 640,052 tons.
- Consequently, Pakistan continues to rely on tomato imports to ensure a consistent supply in local markets throughout the year.

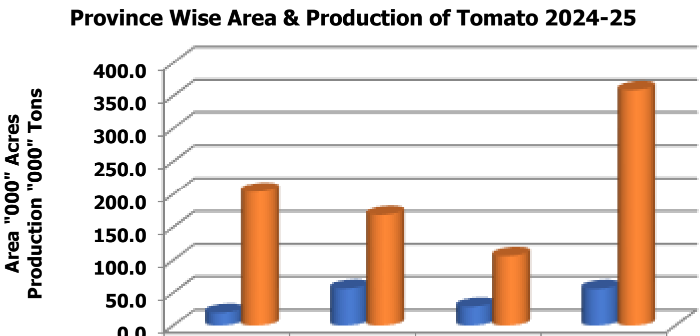


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Province wise Area & Production:

- Balochistan is the leading tomato-producing province, contributing 43% of the national output. Punjab ranks second with a 24% share, followed by Sindh at 20% and Khyber Pakhtunkhwa at 13%.
- In 2024–25, Balochistan recorded the highest tomato production with 359,000 tons from 55,800 acres. Punjab produced 204,000 tons from 19,900 acres, Sindh harvested 168,600 tons from 56,200 acres, and Khyber Pakhtunkhwa reported the lowest output of 106,300 tons from 29,100 acres.



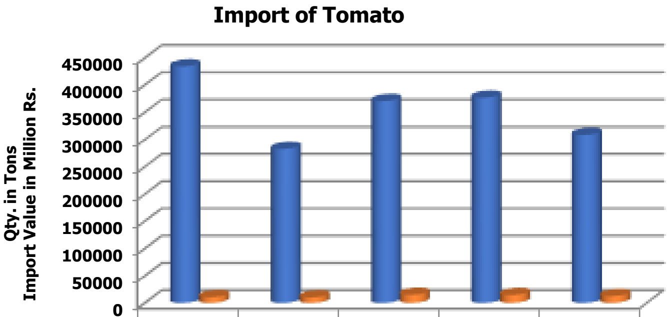


	Punjab	Sindh	KP	B'tan
Area	19.9	56.2	29.1	55.8
Production	204.0	168.6	106.3	359.0

Source:Agricultural Statistics of Pakistan

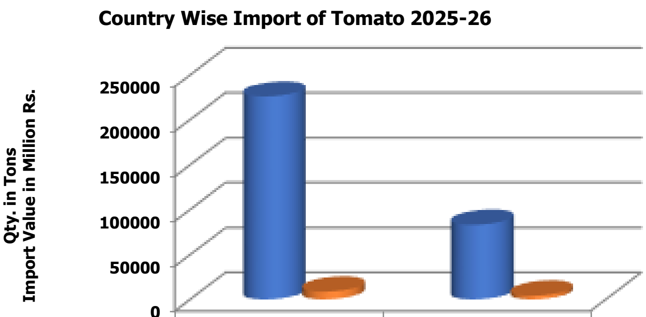
Import Insights:

- During periods of limited domestic supply, Pakistan relies heavily on tomato imports from Afghanistan and Iran to meet consumption needs. During year 2024–25, tomato import was recorded at 3,76,702 tons, costing Rs. 14,554 million, showing a slight increase in quantity but a small decrease in value compared to the previous year. During year 2025–26 (July–February), tomato import has reached to 3,08,718 tons, with an expenditure of Rs. 12,536 million.
- Afghanistan and Iran remain the primary sources of tomato imports. During year 2025–26 (July–February), imports from Afghanistan amounted to 225,677 tons at a cost of Rs. 8,483 million, while imports from Iran stood at 83,041 tons, costing Rs. 4,053 million.



	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 February 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)



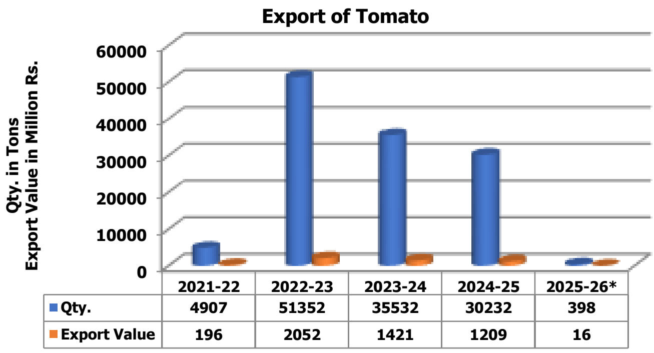
	Afghanistan	Iran
Qty.	225677	83041
Import Value	8483	4053

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

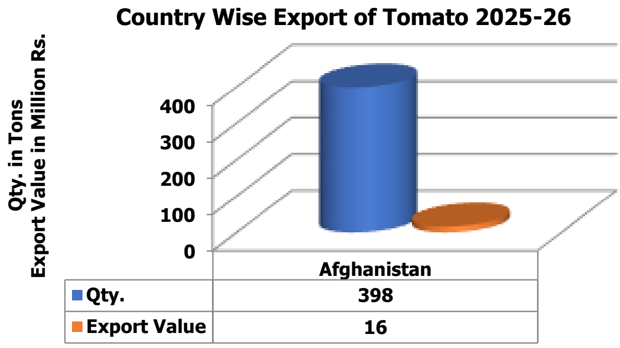
- Since December 2025, Punjab has not required tomato imports due to sufficient supplies from Sindh.

Export Insights:

- Despite its heavy reliance on imports to meet domestic demand, Pakistan also exports tomatoes. Although export volumes are much smaller than imports, they contribute positively to foreign exchange earnings.
- During year 2024–25, Pakistan exported 30,232 tons of tomato, earning Rs. 1,209 million, reflecting a slight decline in both volume and revenue compared to the previous year. For year 2025–26 (July-February), tomato exports registered at 398 tons, generating Rs. 16 million, with Afghanistan remaining the primary destination.
- Tomato exports are generally concentrated between January and May.



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

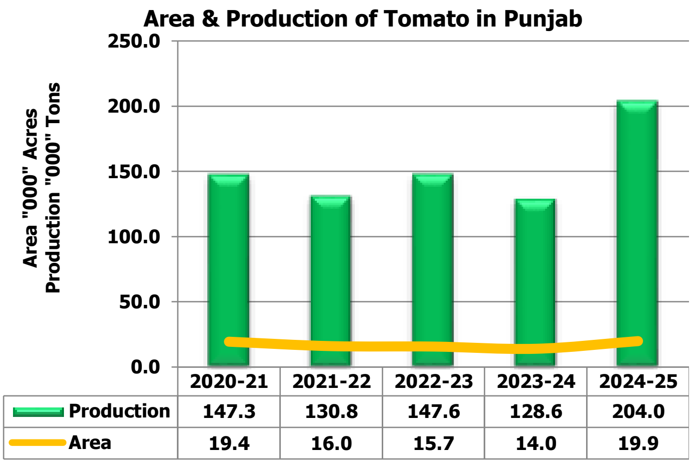


*=Export during July 2025 to February 2026
Source: Pakistan Single Window & Pakistan Bureau of Statistics

PROVINCIAL OVERVIEW

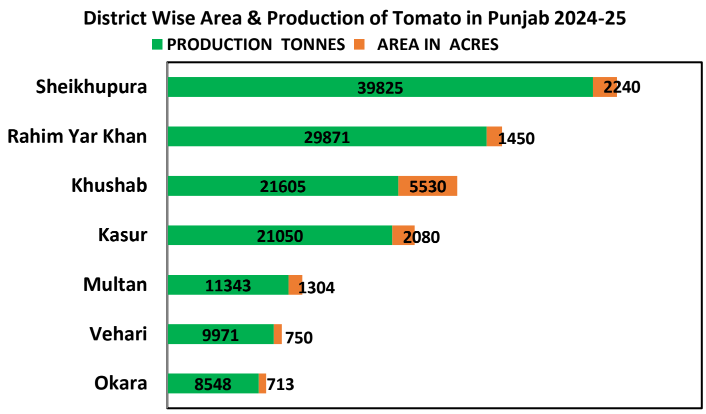
Area & Production:

- Tomato cultivation in Punjab has shown notable fluctuations in both area and production over the past five years. In 2024–25, the area under tomato cultivation expanded significantly to 19,900 acres, reflecting a 42.14% increase compared to the previous year.
- Similarly, tomato production rose sharply to 204,000 tons in 2024–25, representing a substantial 58.6% increase over the preceding year.



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

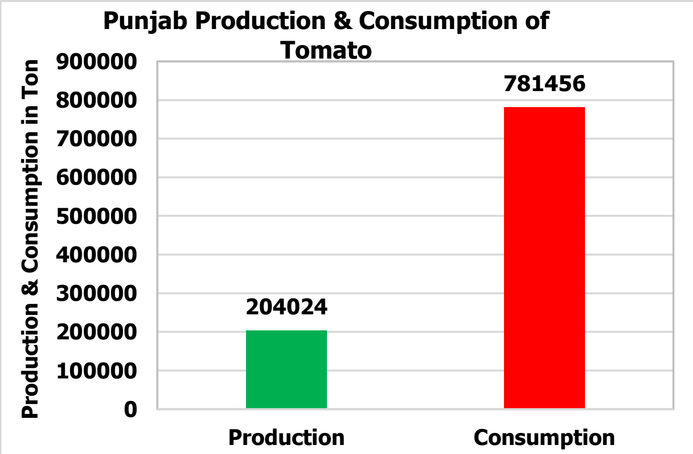
- Punjab's tomato production is concentrated in several key districts, including Sheikhupura, Rahim Yar Khan, Khushab, Kasur, Multan, Vehari, and Okara.
- Among these, Sheikhupura ranked first with a production of 39,825 tons, followed by Rahim Yar Khan with 29,871 tons, while Khushab secured third place with 21,605 tons.



Source: Crop Reporting Service Punjab

Provincial Production & Consumption:

- In 2024–25, provincial tomato production totaled 204,024 tons, remaining well below the estimated consumption requirement of 781,456 tons, resulting in a deficit of 577,432 tons.



Source: Crop Reporting Service Punjab & Agricultural Statistics of Pakistan

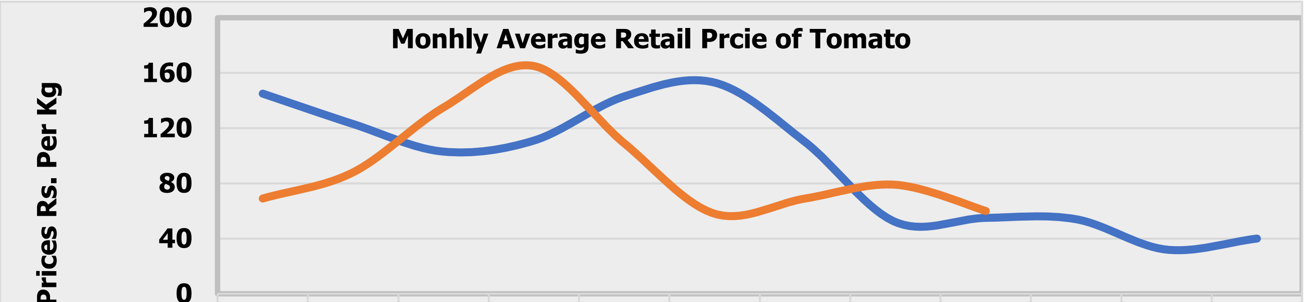
Supply Cycle:

- 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. Due to sufficinet arrival, tomato prices are showing stable trend in local markets. The monthly average retail price of tomato in Punjab is recorded at Rs. 60 per kilogram in March 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			

SUPPLY MANAGEMENT ADVISORY

Assessment

Tomato supply is stable due to its smooth arrival from Sindh areas i.e. Thatta, Tando Allahyar & Larkana, resultantly its prices are showing stable trend in local markets.

Forecast

As a result of steady arrival of tomato from Sindh, its supply & price situation is expected to remain normal. Moreover, local production season of tomato is likely to begin during April, 2026, afterwards supply will further improve. However, Federal Government has now allowed export of tomato to Iran, resultantly demand of tomato is likely to increase substantially and its prices may go on higher side.

Advisory

- District Administration with the help of concerned EADA (E&M) and Secretaries Market Committee should carefully observe supply situation of tomato to ascertain expected impact on supply due to start of tomato export to Iran. Accordingly, necessary actions may be taken to ensure smooth supply of tomato from Sindh with the help of commission agents.
- EADA (E&M) and Secretaries Market Committee should regularly monitor auction proceedings in Agricultural Produce Markets, ensure fixation of tomato prices in a transparent manner and also ensure implementation of notified wholesale prices within domain of Agricultural Produce Markets.

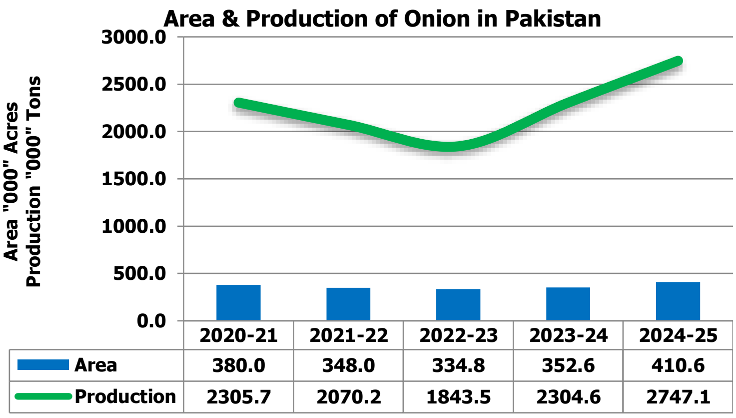
- Price Control Magistrates should keep watching retailers periodically and take stern actions to ensure implementation of notified prices

3. ONION

NATIONAL OVERVIEW

Domestic Area & Production:

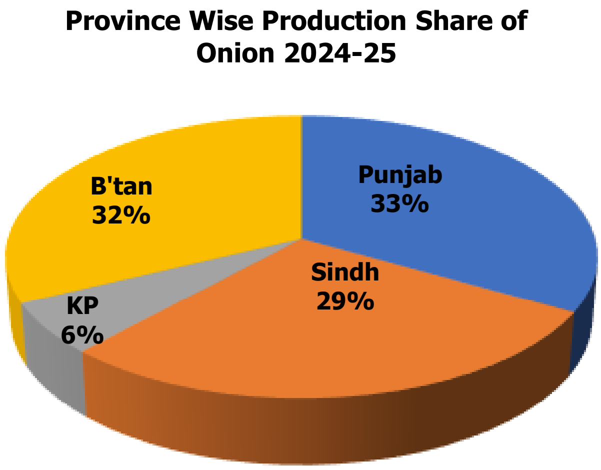
- Over the past three years, Pakistan has witnessed steady growth in both onion production and the area under cultivation. In 2024–25, national onion output increased to 2.747 million tons, representing a 19.2% rise compared to the previous year. During the same period, the cultivated area expanded to 410,600 acres, reflecting a year-on-year increase of 16.44%.



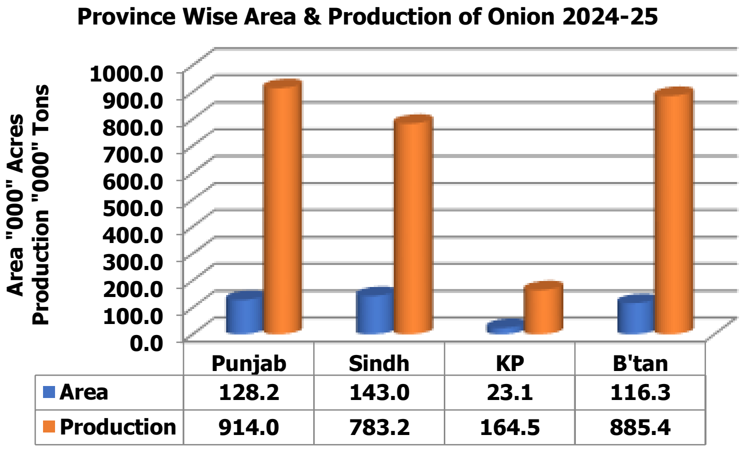
Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Province wise Area & Production:

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



- In 2024–25, Punjab assumed the leading role in national onion production, with total output reaching 914,000 tons. In contrast, Balochistan recorded 885,400 tons, while Sindh produced 483,200 tons. Khyber Pakhtunkhwa contributed a smaller share, with production totaling 164,500 tons.

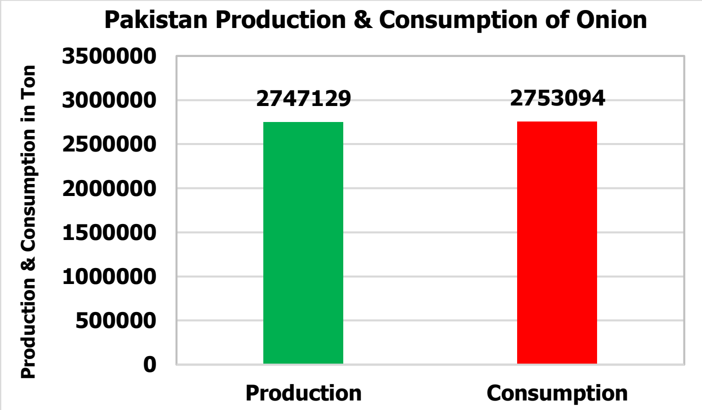


	Punjab	Sindh	KP	B'tan
Area	128.2	143.0	23.1	116.3
Production	914.0	783.2	164.5	885.4

Source:Agricultural Statistics of Pakistan

Domestic Production & Consumption:

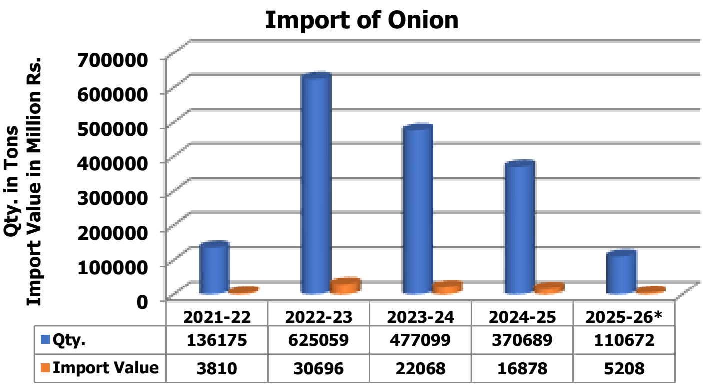
- During 2024–25, national onion production reached 2,747,129 tons, falling slightly short of the estimated consumption requirement of 2,753,094 tons and resulting in a marginal deficit of 5,965 tons. This shortfall was covered through limited imports from Afghanistan and Iran.



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

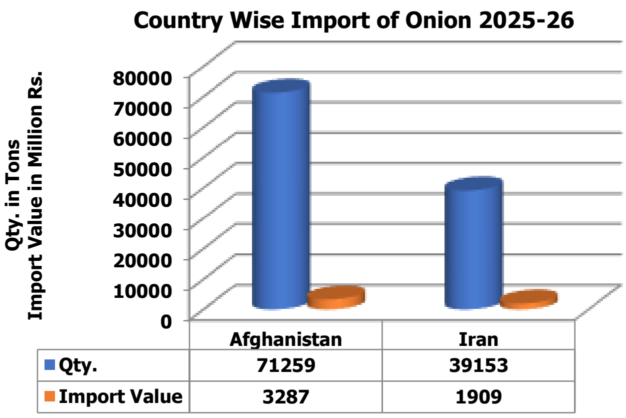
Import Insights:

- 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–February), 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 South Punjab.



	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 February 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

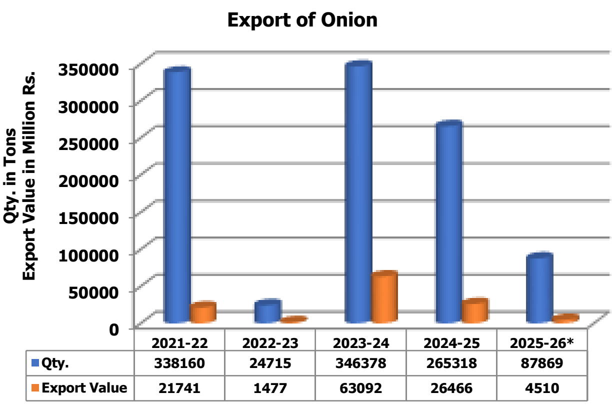


	Afghanistan	Iran
Qty.	71259	39153
Import Value	3287	1909

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

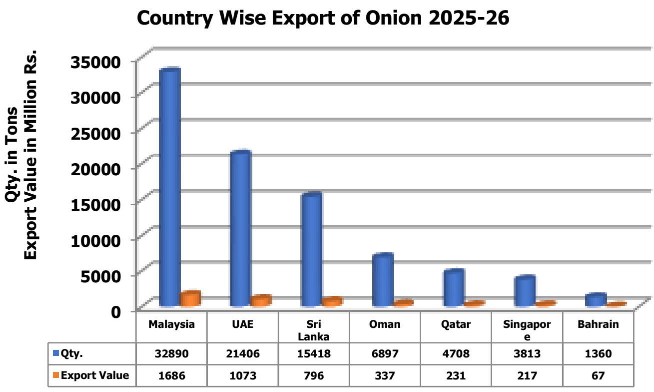
Export Insights:

- In addition to importing onions to meet domestic requirements, Pakistan also exports onions to international markets, contributing to foreign exchange earnings.
- In year 2024–25, onion export was registered at 2,65,318 tons and generated Rs. 26,466 million, although both volume and value showed a decline compared with the previous year. During year 2025–26 (July–February), onion export has reached to 77,240 tons, yielding foreign exchange reserves of Rs. 3,993 million.
- Pakistan's onion exports are primarily directed to Malaysia, the United Arab Emirates, Sri Lanka, Oman, Qatar, Singapore and Bahrain. Export to Malaysia, the UAE, and Sri Lanka remained notably higher than those to other destinations.



	2021-22	2022-23	2023-24	2024-25	2025-26*
Qty.	338160	24715	346378	265318	87869
Export Value	21741	1477	63092	26466	4510

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



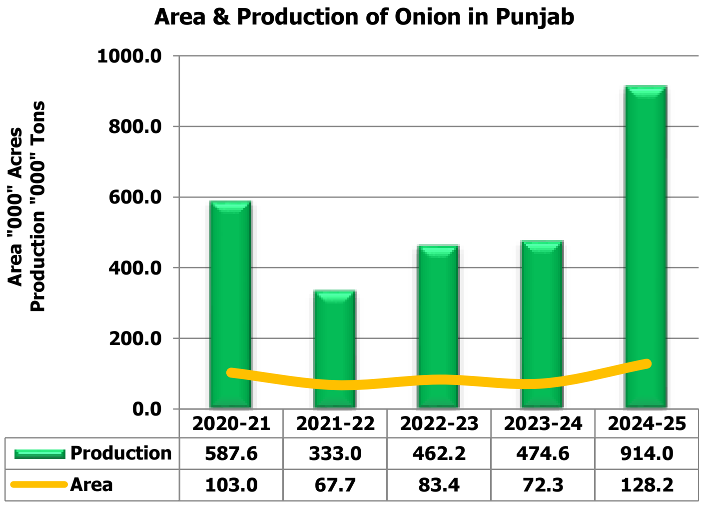
	Malaysia	UAE	Sri Lanka	Oman	Qatar	Singapore	Bahrain
Qty.	32890	21406	15418	6897	4708	3813	1360
Export Value	1686	1073	796	337	231	217	67

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

PROVINCIAL OVERVIEW

Area & Production:

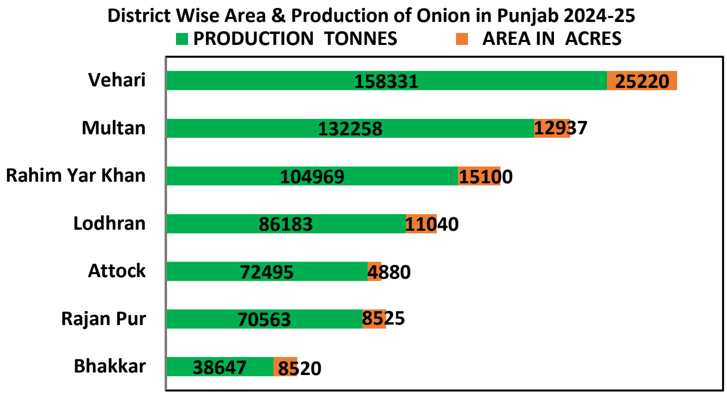
- Punjab has experienced a consistent upward trend in onion production over the past four years, despite fluctuations in the cultivated area.
- In 2024–25, the cultivated area expanded significantly to 128,200 acres, representing a 77.3% increase over the previous year. As a result, onion production rose sharply to 914,000 tons, reflecting a 92.5% increase compared with the preceding year.



	2020-21	2021-22	2022-23	2023-24	2024-25
Production	587.6	333.0	462.2	474.6	914.0
Area	103.0	67.7	83.4	72.3	128.2

Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

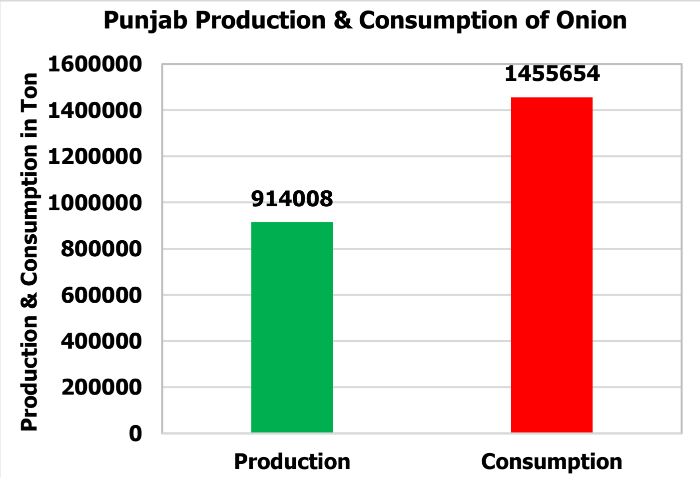
- The principal onion-producing districts in Punjab include Vehari, Multan, Rahim Yar Khan, Lodhran, Attock, Rajanpur and Bhakkar.
- Vehari ranked first with an onion production of 158,331 tons. Multan secured second place with 132,258 tons, while Rahim Yar Khan stood in third position with 104,969 tons.



Source: Crop Reporting Service Punjab

Provincial Production & Consumption:

- Provincial onion production reached 914,008 tons in year 2024-25, falling short of the provincial consumption requirement of 1,455,654 tons and resulting in a deficit of 541,646 tons.



Source: Crop Reporting Service Punjab & Agricultural Statistics of Pakistan

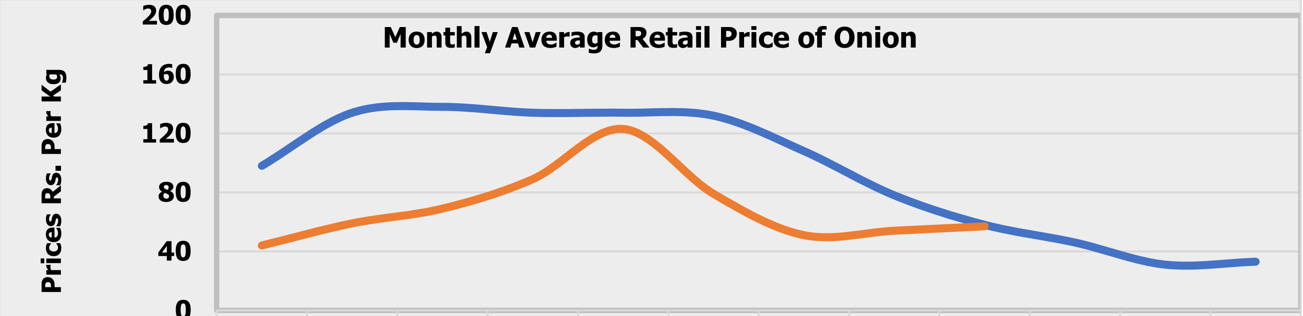
Supply Cycle:

- 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:

Currently, onion supply is mainly arriving from Sindh, and supply from Punjab has also started to reach local markets. Due to adequate arrival of onion, its supply & price situation is exhibiting stable trend 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			

SUPPLY MANAGEMENT ADVISORY

Assessment

Currently, onion arrival in local markets comprises of 70% share from Sindh and 30% share from Punjab. Due to smooth & steady arrival of onion from Sindh and Punjab, supply & price situation of onion is stable in local markets.

Forecast

Due to continued arrival from Sindh and Punjab, supply & price situation of onion is anticipated to remain stable. In coming days, share of local supply of onion will increase as compared to share of Sindh, which will further improve supply situation. However, Federal Government has allowed export of onion to Iran, which may lead to increase in its demand as well as its prices in local markets.

Advisory

- District Administration with the help of concerned EADA (E&M) and Secretaries Market Committee should regularly monitor the supply situation of onion to observe expected impact on supply due to start of onion export to Iran. Moreover, necessary actions may be taken to ensure smooth supply from Sindh and Punjab with the help of commission agents.
- EADA (E&M) and Secretaries Market Committee should monitor auction proceedings in Agricultural Produce Markets, ensure transparent price fixation process and

implementation of notified prices in Agricultural Produce Markets.

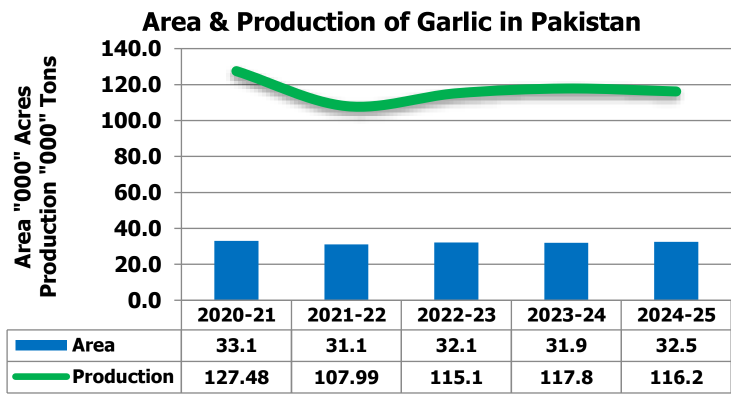
- Price Control Magistrates should regularly monitor the retailers and ensure compliance with notified prices by taking strict actions against offenders.

4. GARLIC

NATIONAL OVERVIEW

Domestic Area & Production

- Domestic cultivation of garlic is exhibiting stable trend over the years and same is the case with its production.
- In year 2024-25, the area under garlic cultivation expanded slightly to 32,500 acres, registering an increase of 1.88% over the preceding year. Whereas, domestic production of garlic stood at 116,200 tons, representing a marginal decline of 1.35% compared to the previous year.

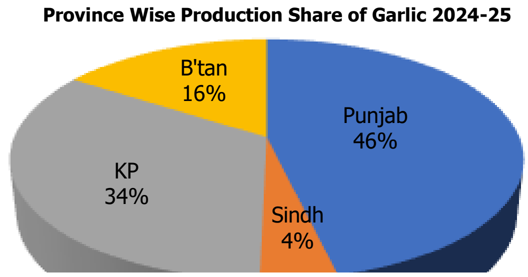


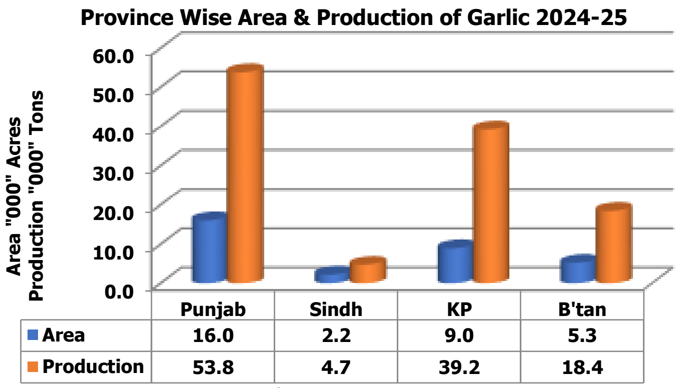
Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Province wise Area & Production:

- A leading share in national garlic production is held by Punjab, contributing 46% of total output, followed by Khyber Pakhtunkhwa with 34%, Balochistan accounting for 16%, and Sindh contributing the remaining 4%.

- During year 2024-25, garlic production in Punjab amounted to 53,800 tons from 16,000 acres. In comparison, Khyber Pakhtunkhwa recorded an output of 39,200 tons harvested from 9,000 acres. Balochistan followed with production

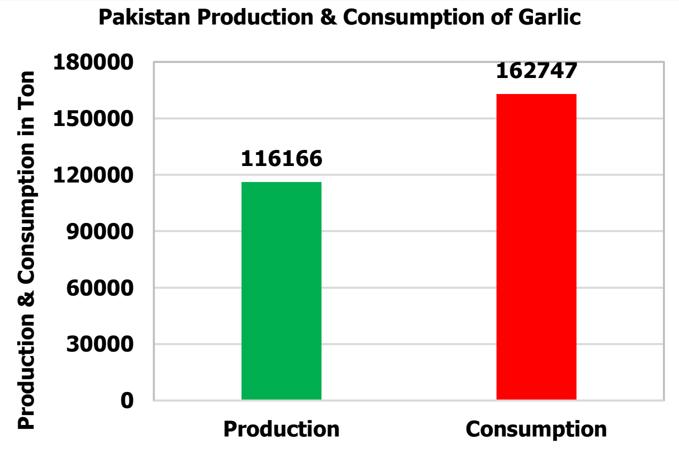




SourceAgricultural Statistics of Pakistan of 18,400 tons from 5,300 acres, while Sindh registered the lowest output at 4,700 tons from a cultivated area of 2,200 acres.

Domestic Production & Consumption:

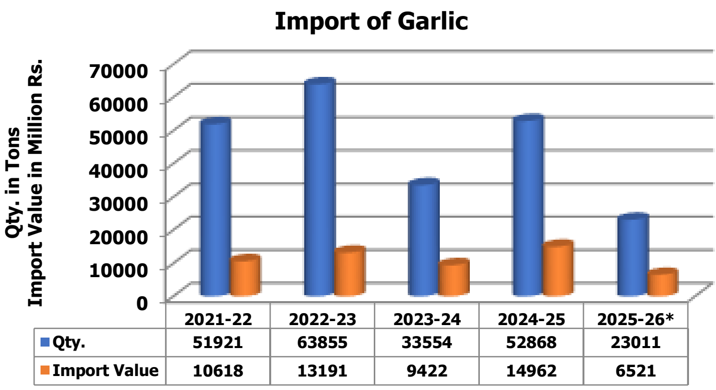
- During year 2024-25, domestic garlic production stood at 1,16,166 tons, which remained below the estimated consumption requirement of 162,747 tons, resulting in a deficit of 46,581 tons.



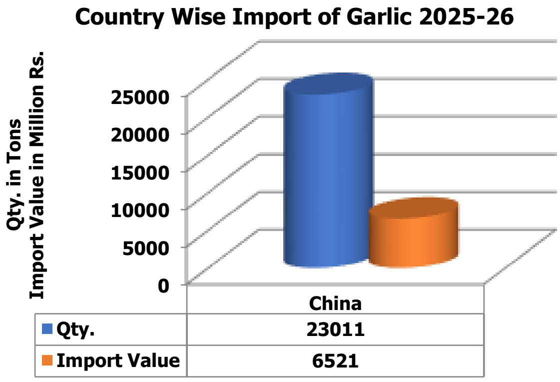
Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Import Insights:

- Imnport of garlic is crucial to meet its consumption requirements throughout the year, Pakistan remains reliant on imports from China.
- In 2024–25, garlic imports was totalled at 52,868 tons, with an expenditure of Rs. 14,962 million. During year 2025–26 (July–February), imports from China reached 23,011 tons, involving a cost of Rs. 6,521 million.



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



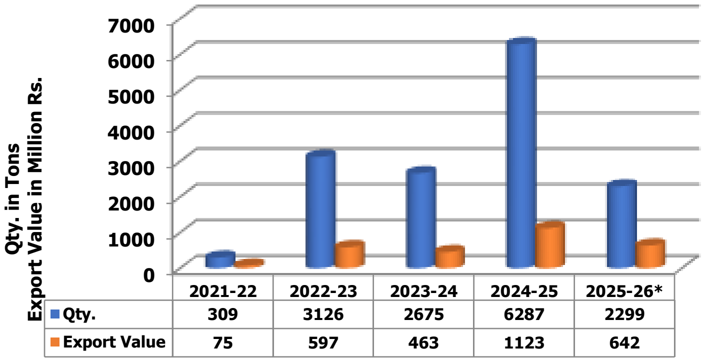
**=Import during July 2025 to February 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics

Export Insights:

- Garlic exports was registered at 6,287 tons during year 2024-25, generating export earnings of Rs. 1,123 million. During year 2025-26 (July-February), exports stood at 2,299 tons, contributing Rs. 642 million to foreign exchange earnings.
- Pakistani garlic is exported mainly to the USA, Afghanistan, Kazakhstan, UAE, Vietnam, UK and Tajikistan.

- A substantial share of export volume is directed to Afghanistan and the USA, while exports to other destinations remain relatively limited. In value terms, exports to the USA generate significantly higher earnings than those to Afghanistan.

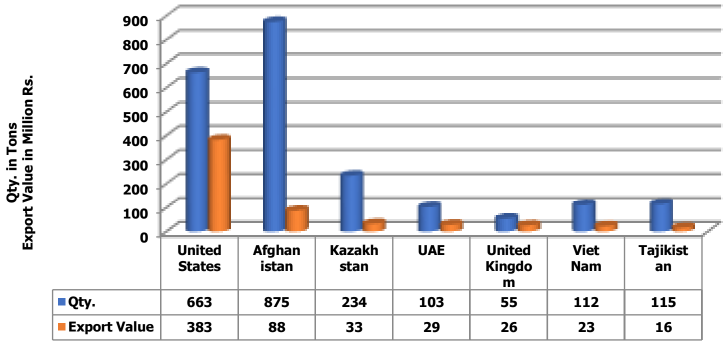
Export of Garlic



	2021-22	2022-23	2023-24	2024-25	2025-26*
Qty.	309	3126	2675	6287	2299
Export Value	75	597	463	1123	642

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

Country Wise Export of Garlic 2025-26



	United States	Afghanistan	Kazakhstan	UAE	United Kingdom	Viet Nam	Tajikistan
Qty.	663	875	234	103	55	112	115
Export Value	383	88	33	29	26	23	16

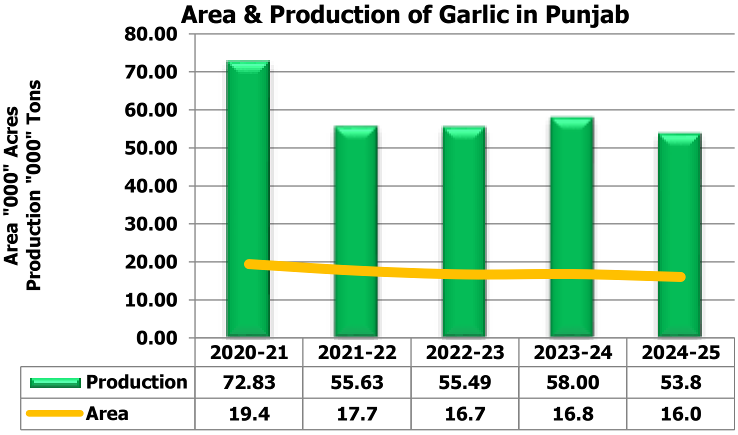
**=Export during July 2025 to February 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

PROVINCIAL OVERVIEW

Area & Production:

- During the last four years, stability has been observed in cultivation as well as production of garlic in Punjab.
- In year 2024-25, cultivated area of garlic in Punjab stood at 16,100 acres, reflecting a year-on-year decline of 4.7% and a 17.52% reduction compared with the acreage reported in year 2020-21. Garlic production in Punjab has been recorded at 53,800 tons, representing a 7.2% decline compared with the previous year and a 26.1% decrease relative to the production level recorded in year 2020-21.

Area & Production of Garlic in Punjab

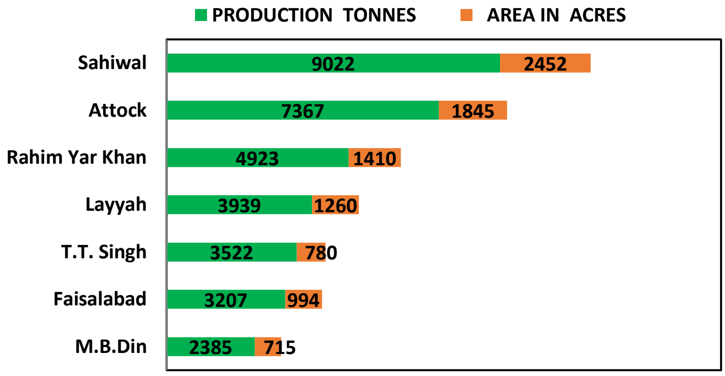


	2020-21	2021-22	2022-23	2023-24	2024-25
Production	72.83	55.63	55.49	58.00	53.8
Area	19.4	17.7	16.7	16.8	16.0

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.

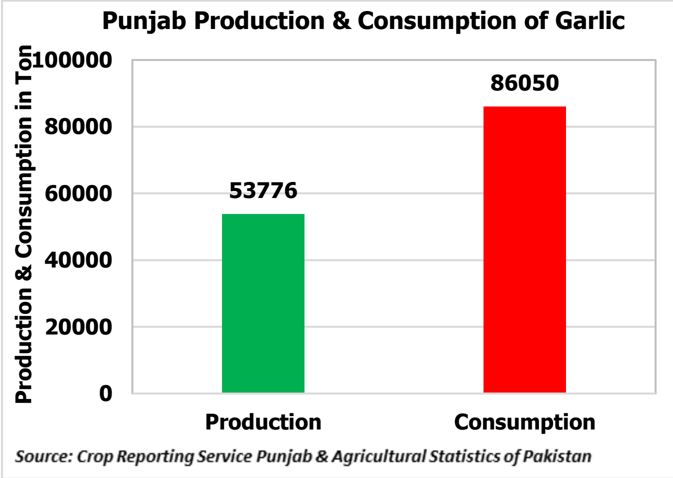
District Wise Area & Production of Garlic Year 2024-25



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.

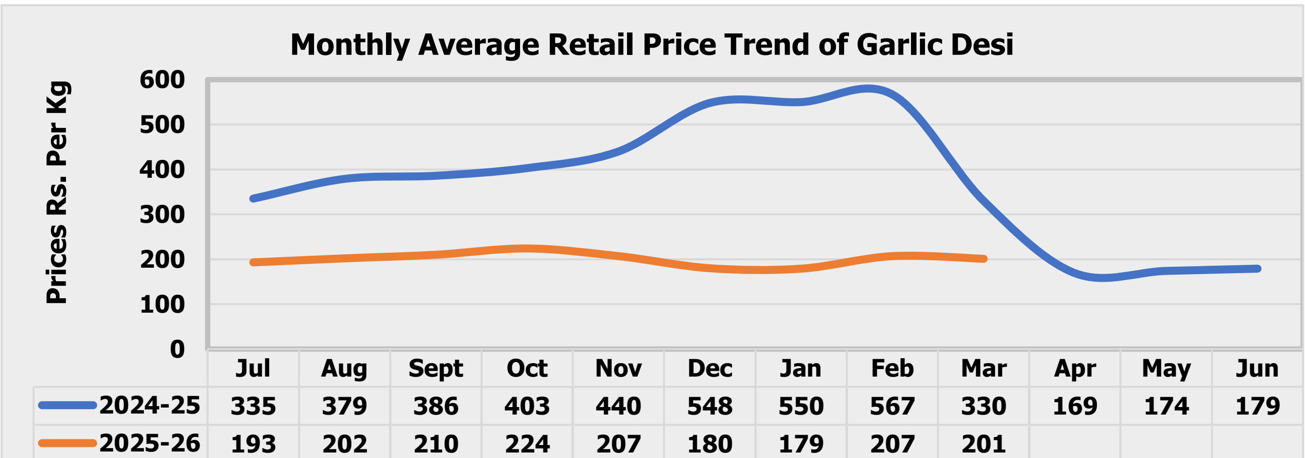


Supply Cycle:

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

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

- **Market Prices:**
  Local production season of garlic is in progress. Thus, supply is stable and its price is prevailing in normal range. Monthly average retail price of garlic in Punjab is Rs.201/Kg during month of March. 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			

SUPPLY MANAGEMENT ADVISORY

Assessment

Due to commencement of local production season of garlic, its supply & price situation is exhibiting stable trend in local markets. In addition, import from China is also in progress which is also providing cushion to supply situation of garlic.

Forecast

The supply & price situation of garlic is likely to remain stable due to its ongoing local production season. Local supply of garlic will improve gradually keeping its prices stable in local markets.

Advisory

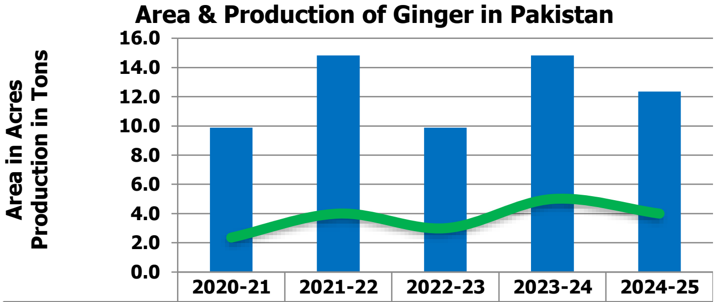
- District Administration with the help of concerned EADA (E&M) & Secretaries Market Committees should closely watch supply & price situation of garlic and must ensure its smooth supply in local markets.
- EADA (E&M) and Secretaries Market Committee should regularly monitor auction proceedings of garlic in Agricultural Produce Markets and ensure fair price fixation mechanism as well as implementation of notified wholesale prices within premises of Agricultural Produce Markets.
- Processing of garlic into paste is required to be encouraged to ensure its availability at normal prices throughout the year.

5. GINGER

NATIONAL OVERVIEW

Domestic Area & Production

- Negligible domestic production of ginger has left Pakistan almost entirely dependent on imports to satisfy consumption needs.
- In year 2024-25, domestic ginger production was limited to just 4 tons from a cultivated area of 12,400 acres, whereas national consumption is estimated at 94,761 tons, indicating a substantial supply gap and highlighting the country’s near-total reliance on imports to meet domestic ginger requirements.

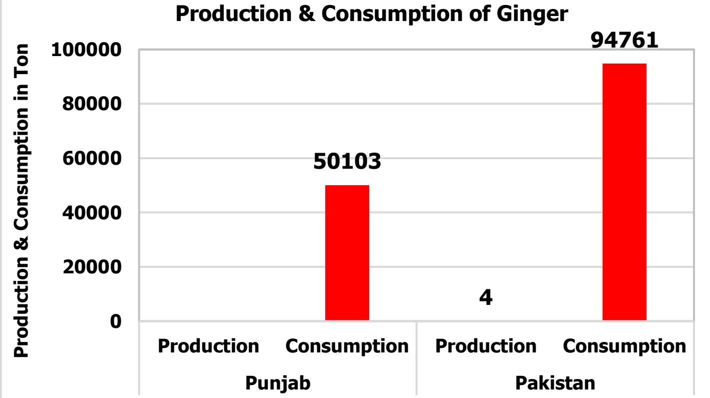


	2020-21	2021-22	2022-23	2023-24	2024-25
Area	9.9	14.8	9.9	14.8	12.4
Production	2.4	4	3.0	5.0	4.0

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

Domestic Production & Consumption:

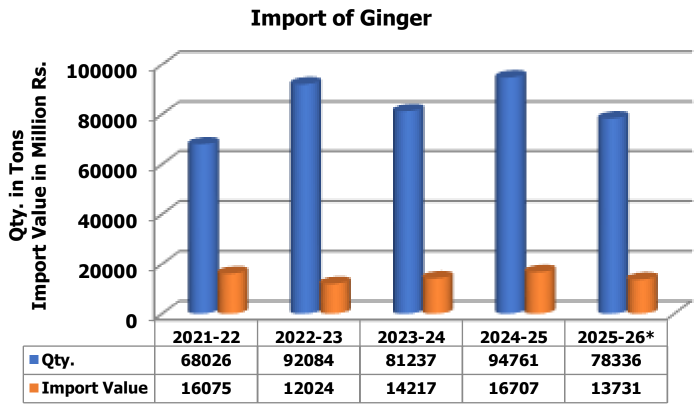
- The domestic production of ginger is recorded at only 4 tons, whereas domestic consumption requirment is estimated at 94,761 tons and consumption requirment of ginger in Punjab is 50,103 tons.



Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics

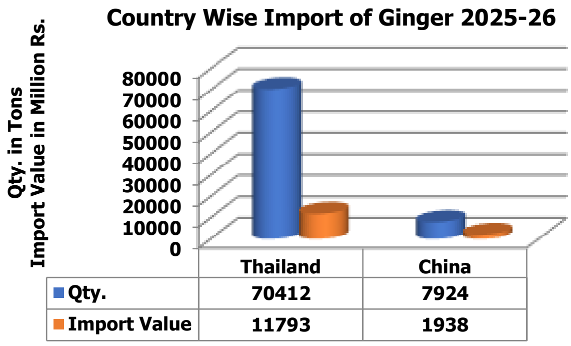
Import Insights

- During year 2024-25, ginger import was recorded at 94,761 tons of ginger, incurring an expenditure of Rs. 16,707 million. In year 2025-26 (July-February), import volumes reached 78,336 tons, with associated costs of Rs. 13,731 million, while Thailand and China remained the principal sources of import.
- During year 2025-26 (July-February), ginger imports from Thailand has reached to 70,412 tons at an expense of Rs. 11,793 million, whereas imports from China amounted to 7,924 tons at a cost of Rs. 1,938 million.



	2021-22	2022-23	2023-24	2024-25	2025-26*
Qty.	68026	92084	81237	94761	78336
Import Value	16075	12024	14217	16707	13731

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

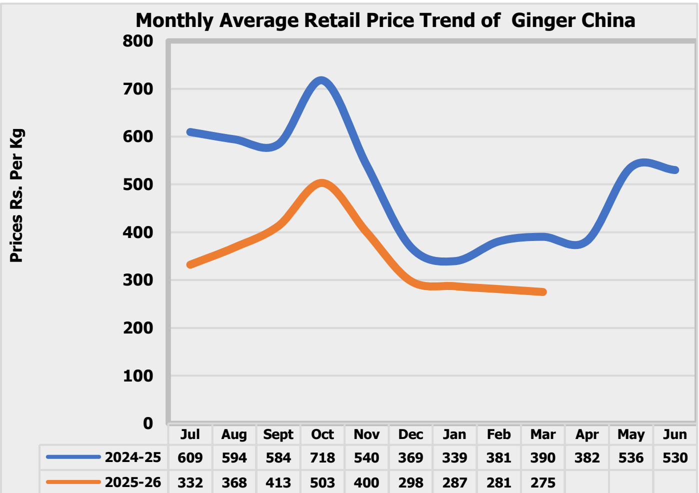


	Thailand	China
Qty.	70412	7924
Import Value	11793	1938

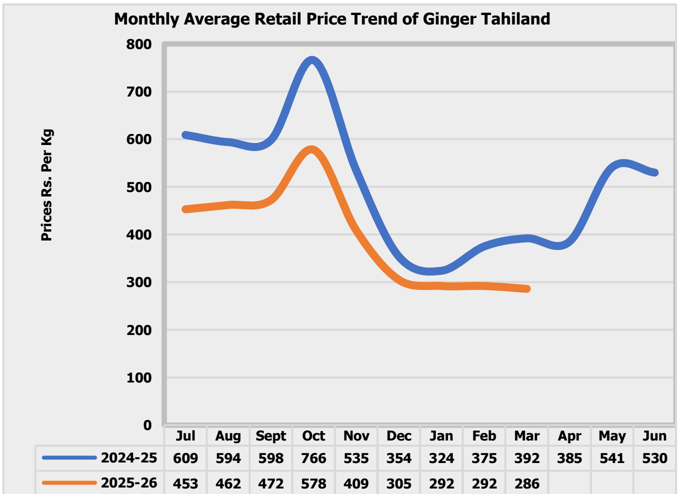
**=Import during July 2025 to February 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics

Market Prices

- Due to smooth import of ginger from Thailand & China, its supply & price situation is quiate stable in local markets. The average monthly retail price of Thai ginger and Ginger China during month of March 2026 is recorded at Rs. 286/Kg and Rs.275/Kg, respectively. Trend lines for monthly average retail prices of Ginger Thai & Ginger China 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	584	718	540	369	339	381	390	382	536	530
2025-26	332	368	413	503	400	298	287	281	275			



	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			

SUPPLY MANAGEMENT ADVISORY

Assessment

Domestic production of ginger is not considerable; thus its domestic consumption requirements are met through import from Thailand & China. Import is steady, thus its supply & price situation is stable in local markets.

Forecast

The production season of ginger is going to end in Thailand and China, which may lead to slight stress in supply and subsequent increase in its prices in local markets.

Advisory

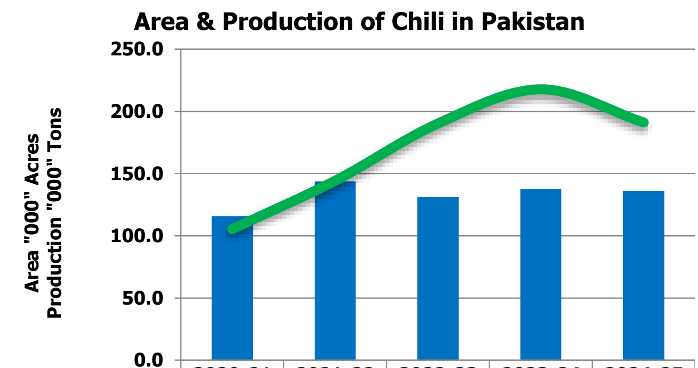
- EADAs (E&M) and Secretaries Market Committees should keep monitoring supply & price situation of ginger and ensure its smooth supplies in Agricultural Produce Markets with the help of commission agents and importers.
- Processing of ginger into paste, may be encouraged to ensure its availability at normal prices throughout the year.
- The Agriculture Department should accelerate research initiatives aimed at promoting local ginger production, thereby reducing reliance on imports and easing the associated economic burden.

6. CHILLIES

NATIONAL OVERVIEW

Domestic Area & Production

- The cultivated area of chilies in Pakistan is exhibiting stability over the last three years. However, domestic production of chili reflected increasing trend from year 2020-21 to year 2023-24, but witnessed a slight decline during year 2024-25.
- In year 2024-25, cultivated area recorded at 1,36,100 acres, indicating a relatively stable trend over the years. Domestic chili production was recorded at 1,91,100 tons, reflecting a 12.21% decrease in contrast with the last year.

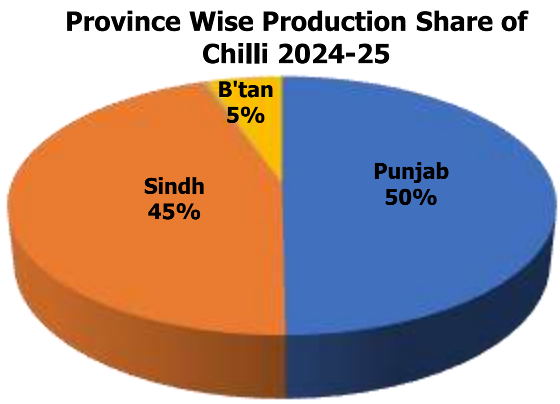


	2020-21	2021-22	2022-23	2023-24	2024-25
Area	115.7	143.7	131.4	137.9	136.1
Production	105.4	144.2	190.2	217.7	191.1

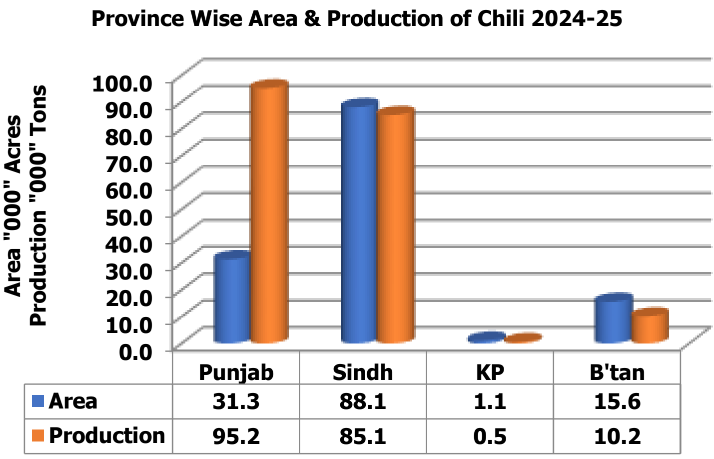
Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Province wise Area & Production

- A dominant position in national chili production is held by Punjab, which contributes 50% of the country's total output. Sindh follows with a 45% share, while Balochistan accounts for the remaining 5% and chili production in Khyber Pakhtunkhwa (KP) is almost non-existent.



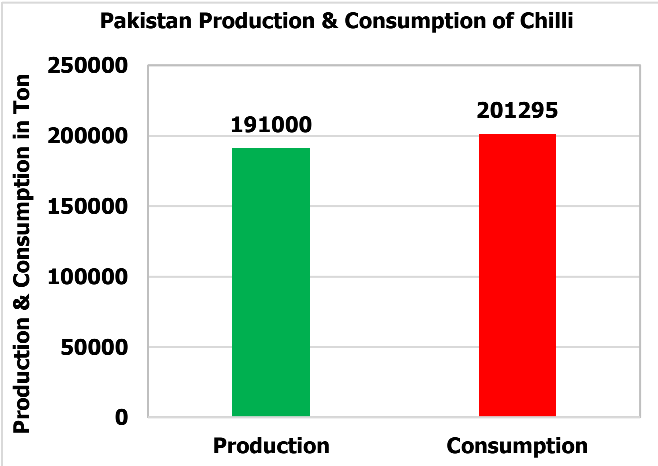
- Punjab stood as leading chili producing province in year 2024-25 by attaining production of 95,200 tons from a cultivated area of 31,300 acres. Sindh ranked second, producing 85,100 tons across 88,100 acres.
- Whereas, chili production in Balochistan and Khyber Pakhtunkhwa (KP) remained minimal, with their production of 10,200 tons and 500 tons, respectively..



Source:Agricultural Statistics of Pakistan

Domestic Production & Consumption:

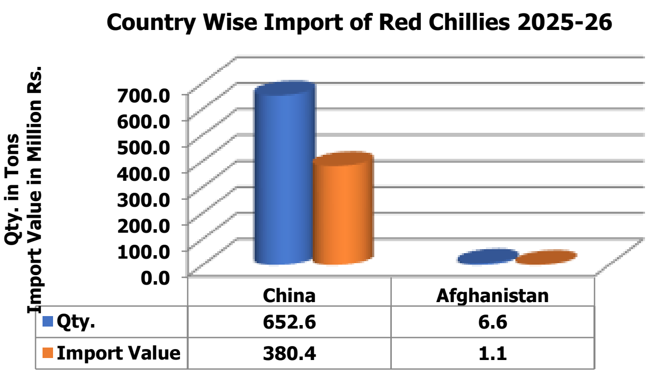
- During year 2024-25, domestic chili production amounted to 1,91,000 tons, which remained below the consumption requirement of 201,295 tons, resulting in a deficit of 10,295 tons.



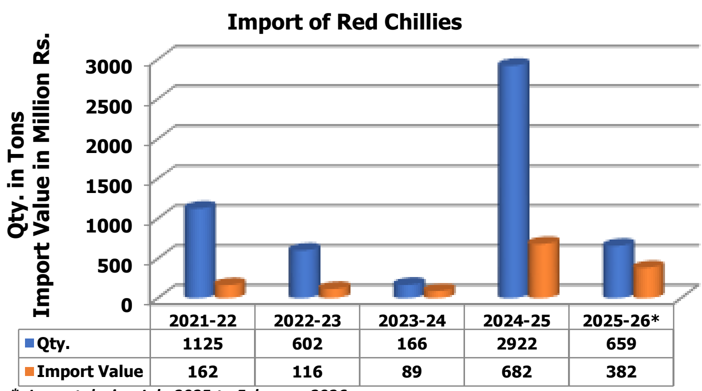
Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Import Insights

- During year 2024-25, red chili import in Pakistan was recorded at 2,922 tons at an expense of Rs. 682 million. During year 2025-26 (July-February), red chili imports registered at 659 tons, with associated cost amounting to Rs. 382 million.
- Pakistan mainly imports red chili from China. For year 2025-26 (July-February), import from China reached to 653 tons at a cost of Rs. 380.4 million, while only 6.6 tons were sourced from Afghanistan, costing Rs. 1.1 million.



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

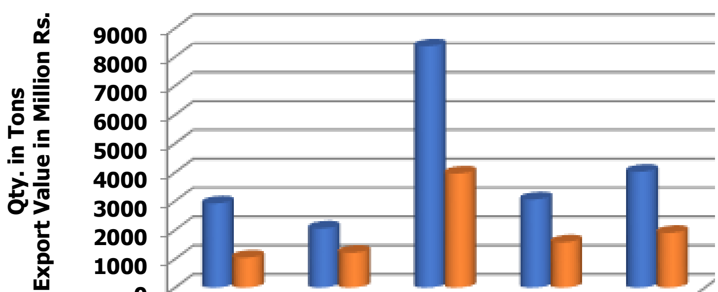


**=Import during July 2025 to February 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

Export Insights

- In terms of both volume and value, Pakistan's red chili exports have consistently exceeded imports. During year 2024-25, export volumes was registered at 3,051 tons, generating revenue of Rs. 1,574 million, while in year 2025-26 (July-February) exports increased to 4,020 tons, yielding export earnings of Rs. 1,900 million.
- Pakistani red chilies are primarily exported to China, United Arab Emirates, Saudi Arabia, Senegal, Iraq and Oman.

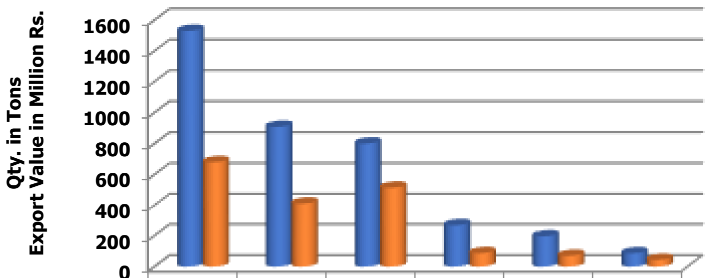
Export of Red Chillies



	2021-22	2022-23	2023-24	2024-25	2025-26*
Qty.	2913	2053	8367	3051	4020
Export Value	1046	1215	3960	1574	1900

**=Export during July 2025 to February 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	908	800	267	195	86
Export Value	679	411	514	86	69	43

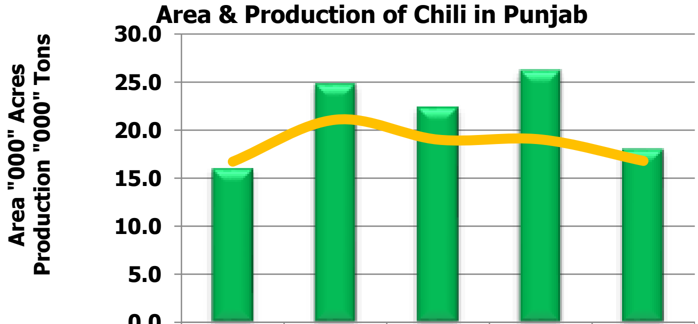
**=Export during July 2025 to February 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

PROVINCIAL OVERVIEW

Area & Production

- Chili cultivation and production in Punjab have experienced significant fluctuations over the past five years. In year 2024-25, area under chili cultivation contracted to 16,800 acres, reflecting an 11.75% reduction from the preceding year. Likewise, Punjab's chili production declined to 18,000 tons, marking a 31.48% decrease compared with the previous year.
- Key chili-producing districts in Punjab include Lodhran, Multan, Rajanpur, Bahawalpur, Muzaffargarh, Vehari and Rahim Yar Khan.

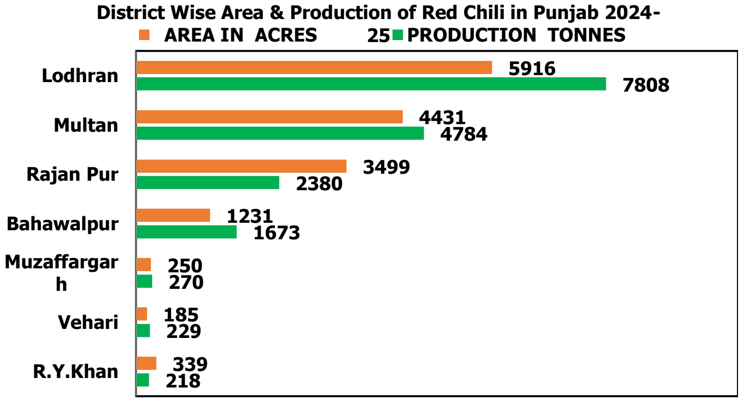
Area & Production of Chili in Punjab



	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

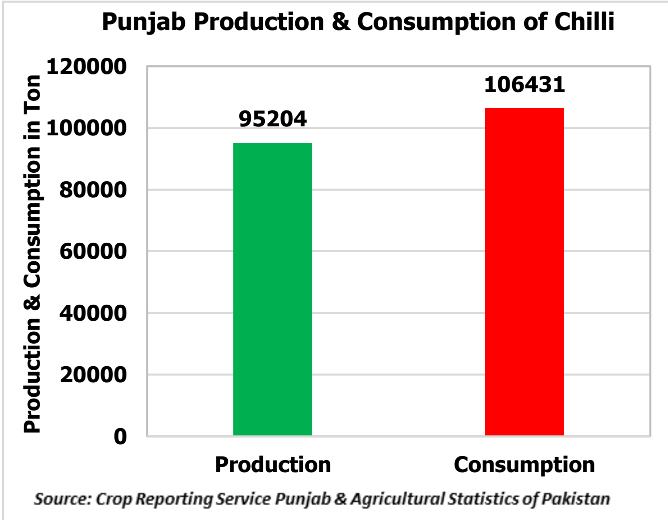


Source: Crop Reporting Service Punjab

- 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.



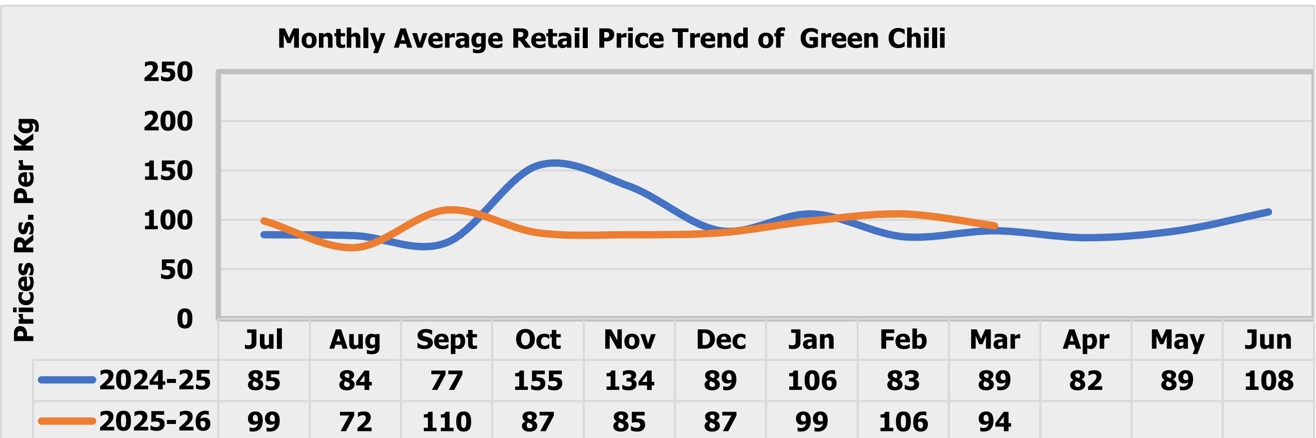
Supply Cycle

- 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 production season of green chilies has started, resultantly its price is showing stable trend in local markets. In March, the average retail price of green chilies in Punjab was recorded at Rs. 94 per kilogram. The graphical trend of monthly average retail prices of green chilies in Punjab is illustrated below:



SUPPLY MANAGEMENT ADVISORY

Assessment

Punjab has 50% share in domestic production of green chilies. Due to start of production season in Punjab, supply & price situation of green chilies is exhibiting stable trend in local markets.

Forecast

Local supply of green chilies will increase gradually, which will help to maintain stability in supply & price situation of green chilies in local markets.

Advisory

- EADAs (E&M) and Secretaries of Market Committees should ensure adequate supply of green chilies in agricultural produce markets with the help of commission agents.
- Public awareness regarding kitchen gardening of chilies should be promoted to reduce reliance on supplies from other provinces.
- The Agriculture Department should expedite research focused on developing and promoting high-yielding, climate-resilient, and off-season seed varieties to enhance self-sufficiency and minimize inter-provincial dependence.

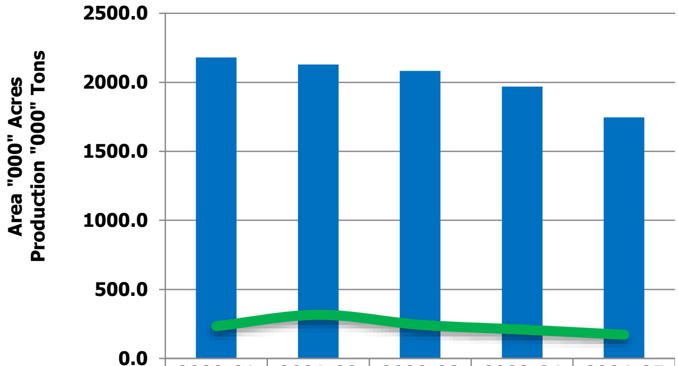
7. GRAM (Chickpea)

NATIONAL OVERVIEW

Domestic Area & Production:

- The area under gram cultivation in the country has been gradually declining, leading to a corresponding decrease in domestic production, which remains well below the national consumption requirement.
- In year 2024-25, gram was cultivated on 17,47,200 acres, marking an 11.2% reduction compared with the previous year's acreage.
- Similarly, domestic gram production fell to 1,71,941 tons during year 2024-25, representing a 17.7% decline from the previous year's output.

Area & Production of Gram in Pakistan



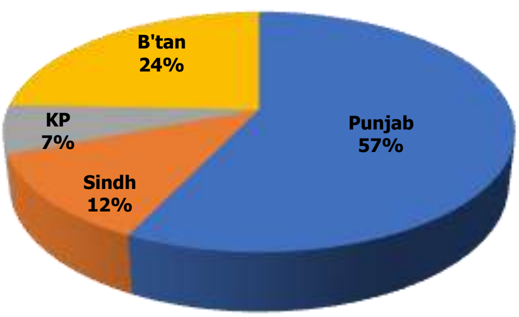
	2020-21	2021-22	2022-23	2023-24	2024-25
Area	2181.2	2129.3	2082.4	1969.7	1747.2
Production	233.9	316.2	243.6	209.0	171.9

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

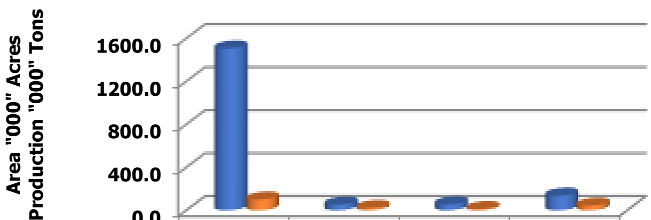
Province wise Area & Production:

- Punjab continues to dominate gram production in the country, contributing 57% of the total output, followed by Balochistan at 24%, Sindh at 12%, and Khyber Pakhtunkhwa (KP) at 7%.
- During year 2024-25, Punjab produced 98,500 tons of gram from 1,505,000 acres. Meanwhile, Balochistan, Sindh, and Khyber Pakhtunkhwa recorded production levels of 42,000 tons, 20,700 tons, and 11,300 tons, respectively.

Province Wise Production Share of Gram 2024-25



Province Wise Area & Production of Gram 2024-25

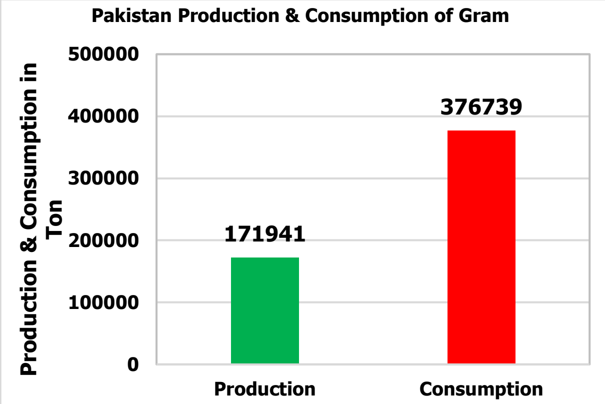


	Punjab	Sindh	KP	B'tan
Area	1505.0	52.1	54.5	135.6
Production	98.5	20.7	11.3	42.0

Source:Aaricultural Statistics of Pakistan

Domestic Production and Consumption:

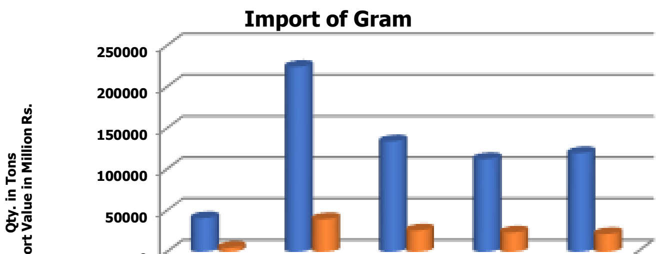
- Pakistan's insufficient domestic gram production necessitates regular imports to meet national consumption requirements. In year 2024-25, domestic production totalled 171,941 tons, falling well short of the estimated consumption demand of 3,76,739 tons, resulting in a significant supply deficit of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



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

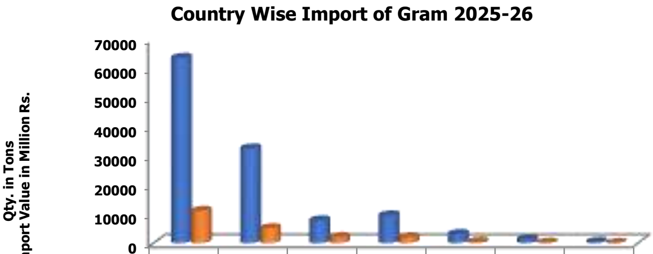
Import Insights:

- During year 2024-25, gram import in Pakistan was registered at 112,047 tons at a total cost of Rs. 23,458 million, while during year 2025-26 (July-February) gram import reached 1,19,296 tons, with an expenditure of Rs. 21,530 million. The major sources of gram imports for Pakistan include Australia, Russia, Canada, the USA, Tanzania, Argentina & Ukraine.



	2021-22	2022-23	2023-24	2024-25	2025-26*
Qty.	40674	224257	134087	112047	119296
Import Value	4955	39456	25823	23458	21530

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



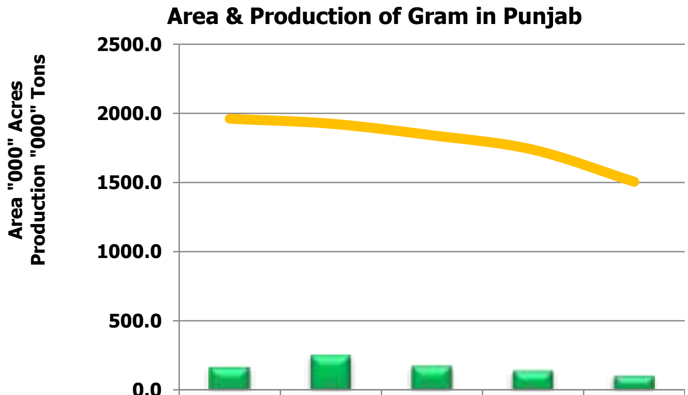
	Australia	Russia	United States	Canada	Tanzania	Argentina	Ukraine
Qty.	63818	32641	7870	9584	3167	1319	458
Import Value	11174	5173	2152	2100	553	190	88

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

PROVINCIAL OVERVIEW

Area & Production:

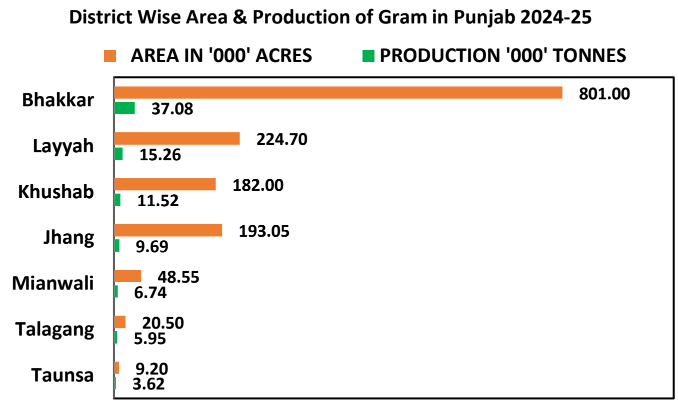
- The cultivation and production of gram in Punjab have been showing a persistent downward trend during last four years.
- In year 2024-25, cultivated area of gram recorded at 1,505,000 acres, showing 13.35% decline in contrast with the last year.
- Similarly, production of gram in the province registered at 98,500 tons, depicting a 28.6% decline over the preceding year.



	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

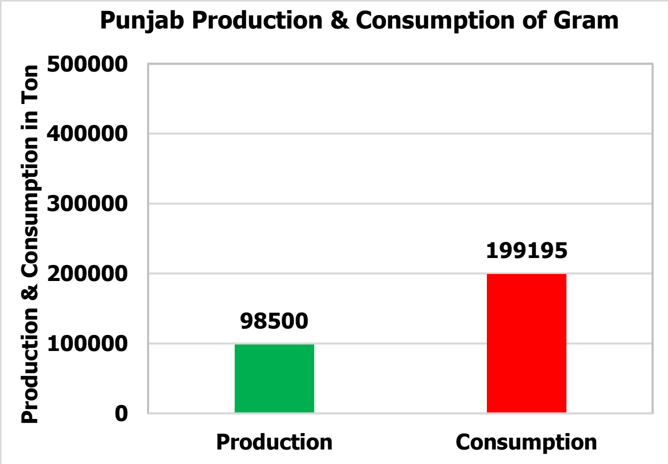
- Key gram-producing districts in Punjab are Bhakkar, Layyah, Khushab, Jhang, Mianwali, Talagang and Taunsa. Bhakkar stood as the highest producer, with an output of 37,100 tons harvested from 8,01,000 acres.



Source: Crop Reporting Service Punjab

Provincial Production & Consumption:

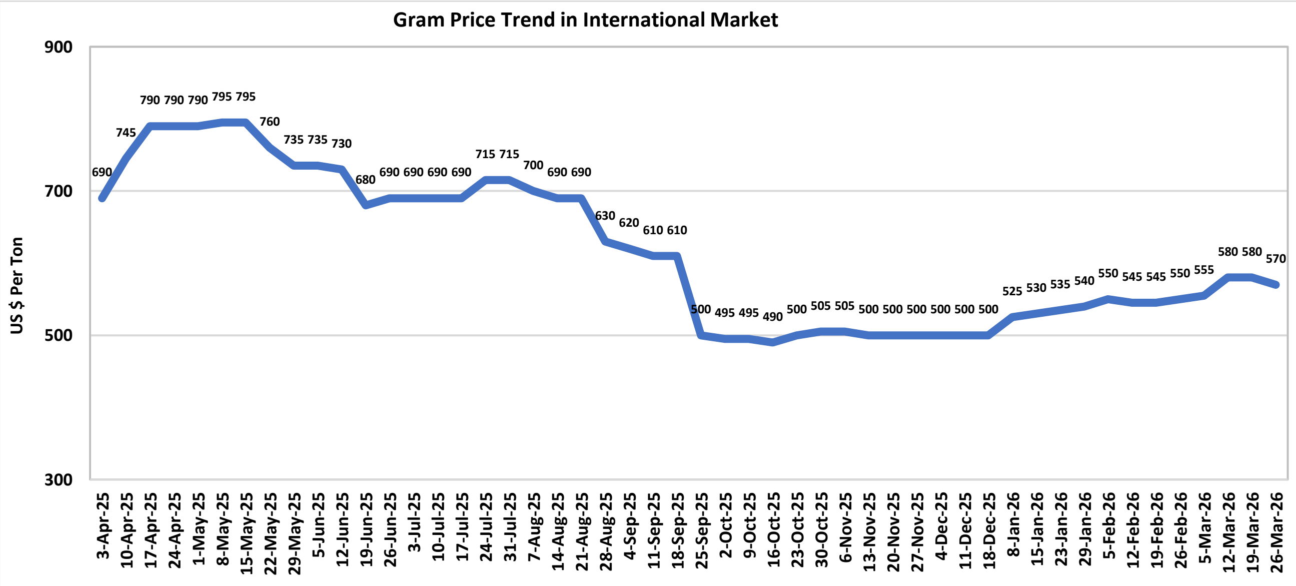
- The provincial production of gram is ecorded at 98,500 tons duirng year 2024-25, showing defict of 1,00,695 tons as compared to provincial consumption requriment i.e. 1,99,195 tons.



Source: Crop Reporting Service Punjab & Agricultural Statistics of Pakistan

International Market Trends

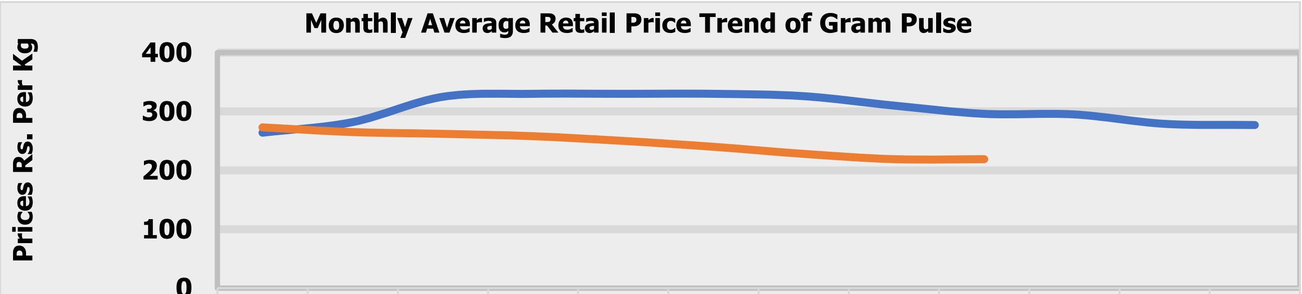
- International prices of gram was increased but it recently some decrease is observed, current international price of gram is USD 570/ton. The weekly price trends reported by the Global Pulse Confederation, is outlined below:



Source: Global Pulses Confederation

Local Market Price:

- Due to its smooth import situation, local prices of gram are showing slightly declining trend. In Punjab, the average monthly retail price of gram pulse recorded during month of March-2026 is Rs.219Kg, 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			

SUPPLY MANAGEMENT ADVISORY

Assessment

Due to insufficient domestic production, gram is being imported from Australia, Canada, and Russia to meet consumption requirements. Previously, relatively low international prices facilitated smooth imports, contributing to a stable supply and price situation in local markets.

Forecast

Local production season of gram is going to start during April, 2026 which will reduce dependence on import from other countries. Thus, supply & price situation of gram is likely to remain stable in local markets.

Advisory

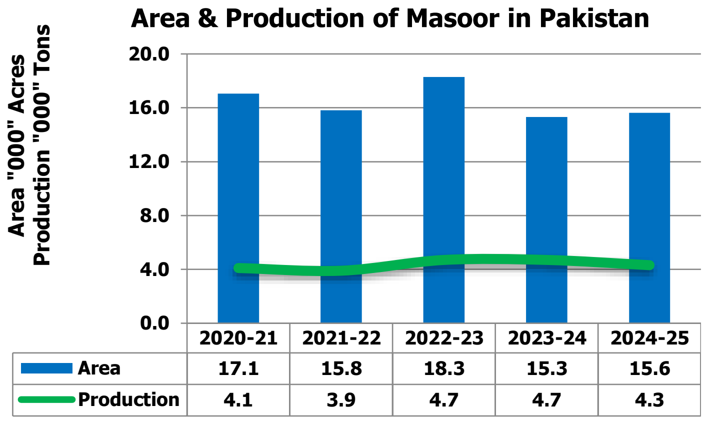
- Local production season of gram is going to commence during April 2026, therefore EADAs (E&M) and Secretaries Market Committees of gram production areas i.e. Bhakkar, Khushab, Layyah & Mianwali should monitor crop situation with help of local commission agents.
- District Administration should consider arrival of local crop and subsequent expected decrease in prices of gram in DPCC meetings.
- Price Control Magistrates should regularly inspect the retailers and ensure implementation of notified prices in local markets.

8. LENTIL (MASOOR)

NATIONAL OVERVIEW

Domestic Area & Production:

- Pakistan's masoor (lentil) output 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 year 2024-25, 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 year 2020-21. During the same period, masoor production declined to 4,300 tons, reflecting an 8.5% reduction compared with the previous year.

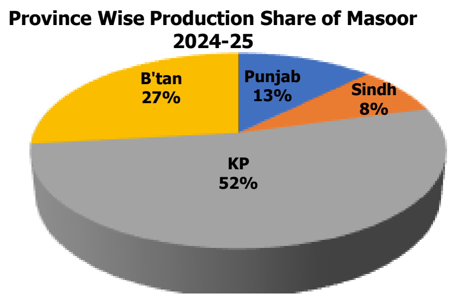


	2020-21	2021-22	2022-23	2023-24	2024-25
Area	17.1	15.8	18.3	15.3	15.6
Production	4.1	3.9	4.7	4.7	4.3

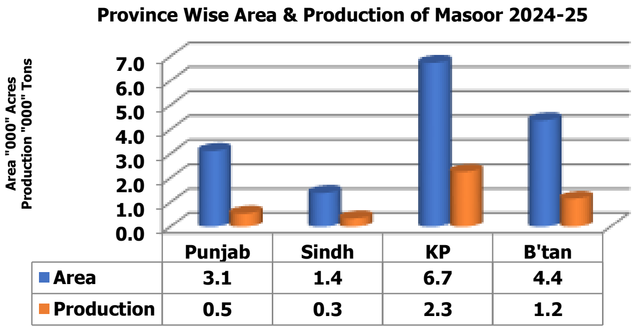
Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Province wise Area & Production:

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



- 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.

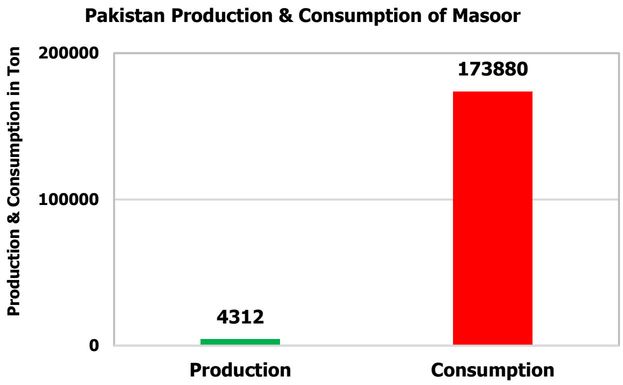


	Punjab	Sindh	KP	B'tan
Area	3.1	1.4	6.7	4.4
Production	0.5	0.3	2.3	1.2

Source:Agricultural Statistics of Pakistan

Domestic Production & Consumption

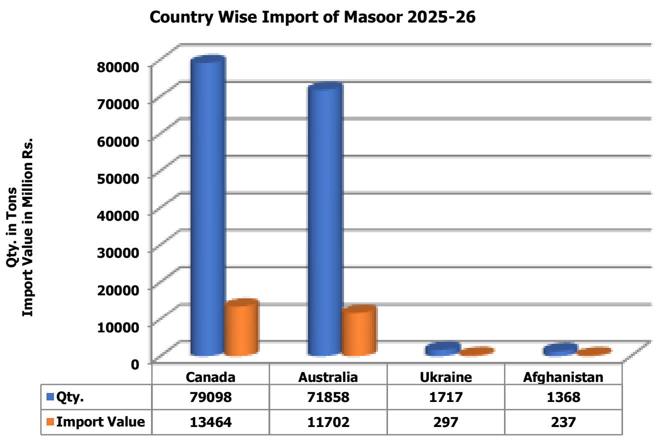
- A wide gap between production and demand was evident in year 2024-25, as domestic masoor output totaled only 4,312 tons against a national consumption requirement of 173,880 tons, resulting in a substantial deficit of 169,568 tons.



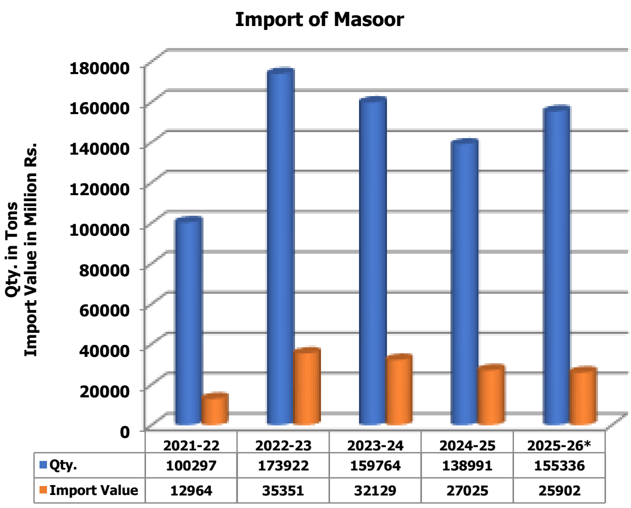
Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

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 2025–26 (July–February), masoor imports amounted to 1,55,336 tons, involving an expenditure of Rs. 25,902 million.
- Masoor imports are primarily sourced from Canada, Australia, Ukraine, and Afghanistan, with high import volume from Canada and Australia, while contributions from Ukraine and Afghanistan remain comparatively limited.
- During year 2025-26 (July-February), imports from Canada totalled 79,098 tons at a cost of Rs. 13,464 million, whereas Australia supplied 71,858 tons, valued at Rs.11,702 million.



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

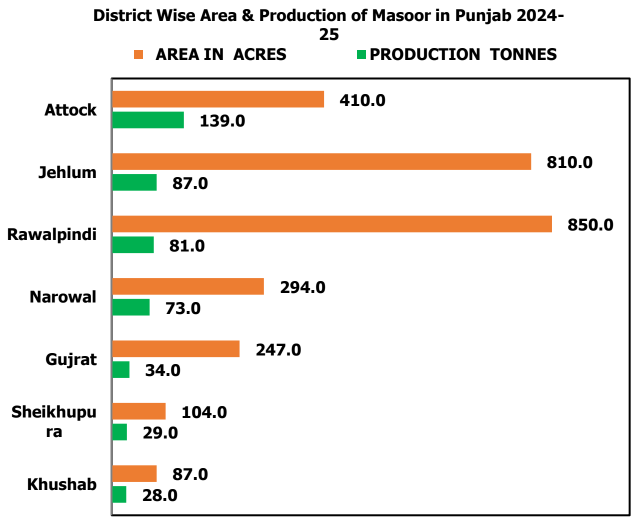


**=Import during July 2025 to February 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

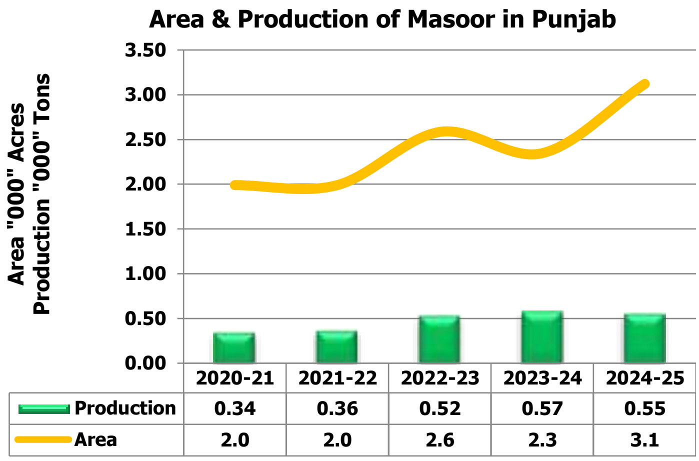
PROVINCIAL OVERVIEW

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 year 2024-25, 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 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.



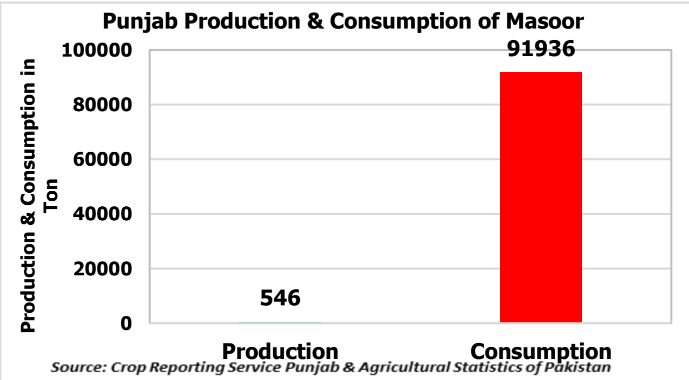
Source: Crop Reporting Service Punjab



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

Provincial Production & Consumption:

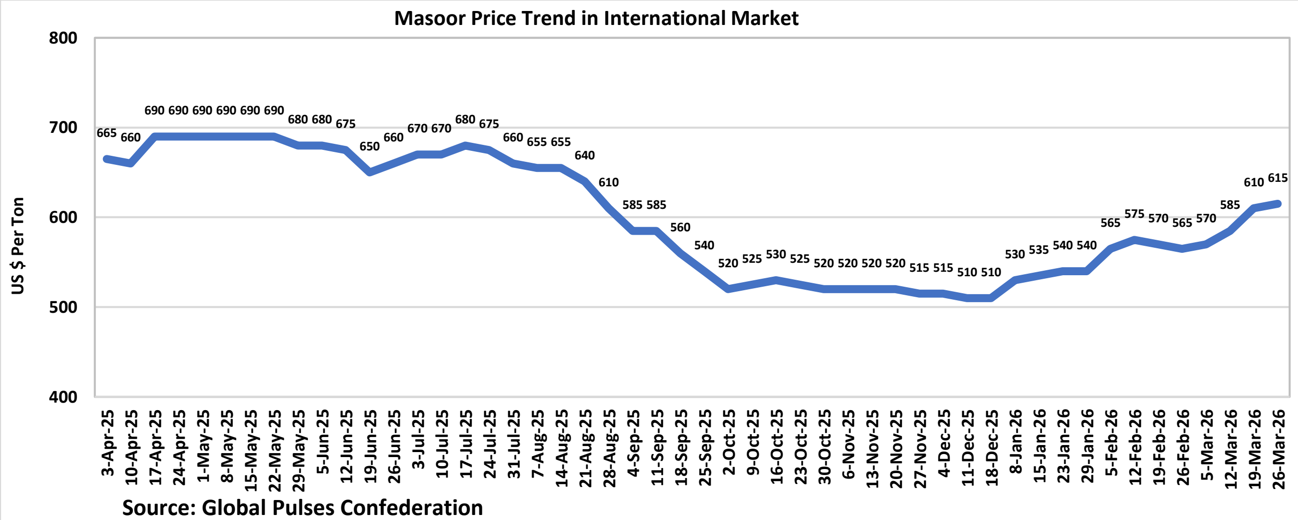
- During year 2024-25, provincial production of masoor recorded at 546 tons, falling well short of provincial consumption requriment i.e. 91,936 tons and resulted in deficit of 91,390 tons.



Source: Crop Reporting Service Punjab & Agricultural Statistics of Pakistan

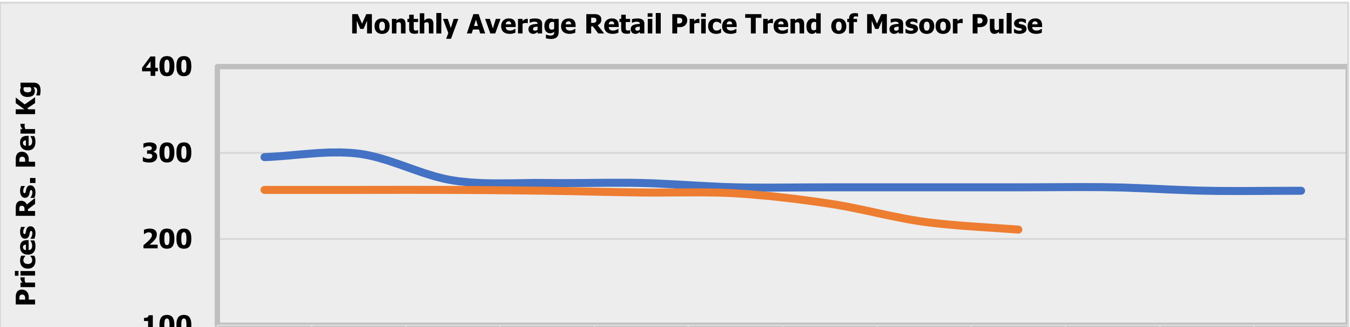
International Market Trend:

During last three weeks, international prices of masoor are exhibiting increasing trend and current international prices of maoor are USD 615/ton. The weekly trend in global masoor prices, as reported by the Global Pulse Confederation, is illustrated below:



Local Market Price:

- Import situation of masoor remained smooth, resultantly supply & price situation of masoor is showing slightly declining trend in local markets. In Punjab, the average monthly retail price of masoor recorded during month of March is Rs. 211/Kg.



	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			

SUPPLY MANAGEMENT ADVISORY

Assessment

The domestic production of masoor is negligible, therefore its import is mandatory to cater for domestic consumption requirements. Previously, international prices of masoor were on lower side, resultantly sufficient import was undertaken and subsequnetly supply & price situation of masoor showed stable trend in local markets. However, now international prices of masoor are showing continously increasing trend which may cause surge in local prices.

Forecast

International prices of masoor are showing increasing trend which may also increase prices of masoor in local markets. However, local crop will also be available but its impact in market will be negligible.

Advisory

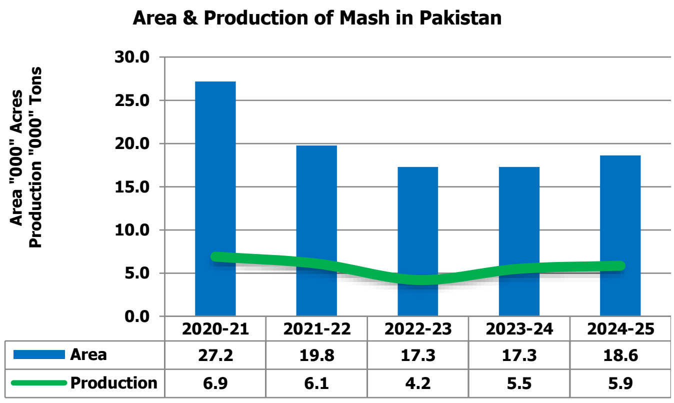
- The District Administration, in coordination with the concerned EADAs (E&M) and Secretaries of Market Committees, should hold regular meetings with commission agents, importers, and dealers to assess the current supply situation and take timely measures to maintain stability in the supply and prices of masoor.
- The stock position should also be monitored and updated regularly to enable timely interventions for ensuring stable supply and price of masoor.
- Price Control Magistrates should maintain strict and continuous surveillance of retailers to ensure effective enforcement of notified prices in the markets.

9. MASH

NATIONALOVERVIEW

Domestic Area & Production:

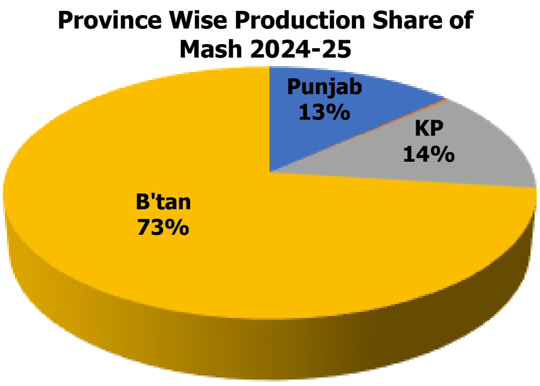
- Extremely limited domestic production of mash has compelled Pakistan to rely on imports for nearly 94% of its total consumption requirements.
- A gradual upward movement in both cultivated area and production has been observed over the past three years. n year 2024-25, mash cultivation expanded to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

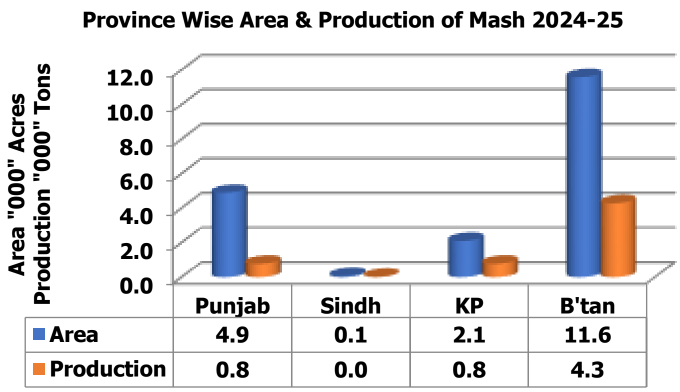


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

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.

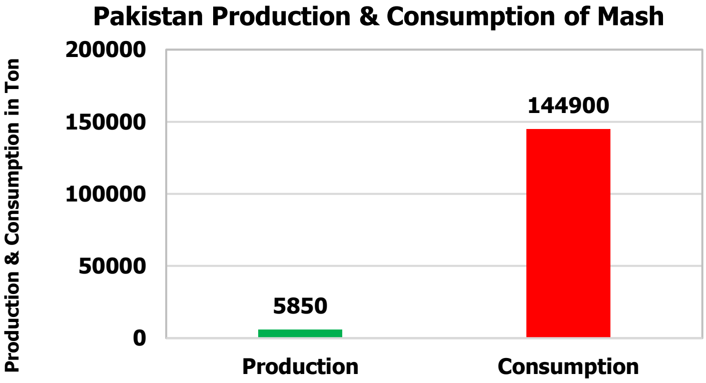




Source:Agricultural Statistics of Pakistan

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.

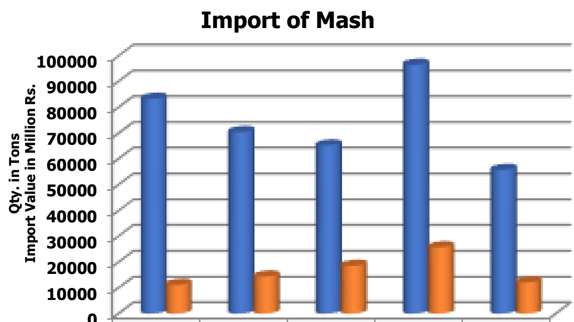


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Import Insights:

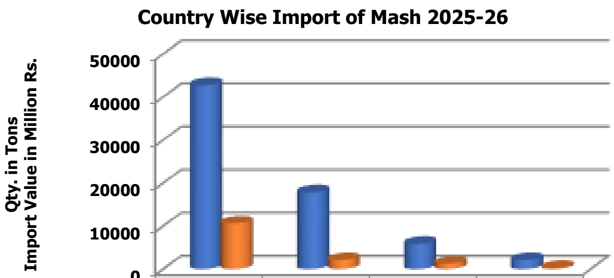
- Owing to limited domestic output, Pakistan continues to rely heavily on mash imports to meet national consumption needs. In year 2024-25, mash imports amounted to 96,565 tons, with an associated expenditure of Rs. 25,701 million. During year 2025-26 (July-February), import volumes reached 55,676 tons, incurring a cost of Rs. 12,136 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-February), imports from Myanmar totalled at 42,750 tons, 17,819 tons imported from Thailand, 5,900 tons imported from Iran and imports from Afghanistan remained minimal at 2,139 tons.



	2021-22	2022-23	2023-24	2024-25	2025-26*
Qty.	83260	70437	65245	96565	55676
Import Value	11231	14420	18559	25701	12136

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



	Myanmar	Thailand	Iran	Afghanistan
Qty.	42750	17819	5900	2139
Import Value	10635	2129	1288	256

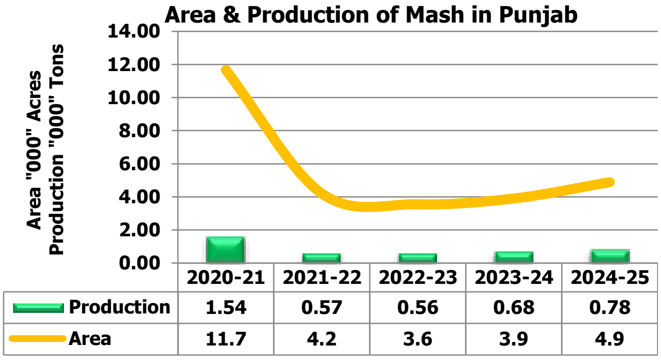
**=Import during July 2025 to February 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

PROVINCIAL OVERVIEW

Area & Production:

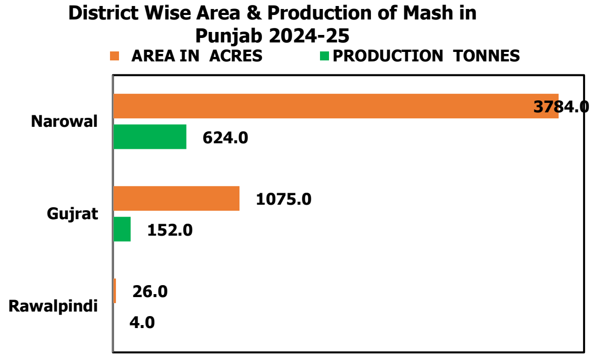
- A modest but steady improvement has been observed in Punjab's mash cultivation and production over the last three years. In year 2024-25, provincial production of mash increased to 780 tons, registering a 14.7% rise compared with the previous year, while the cultivated area expanded to 4,900 acres,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

- 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.



	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

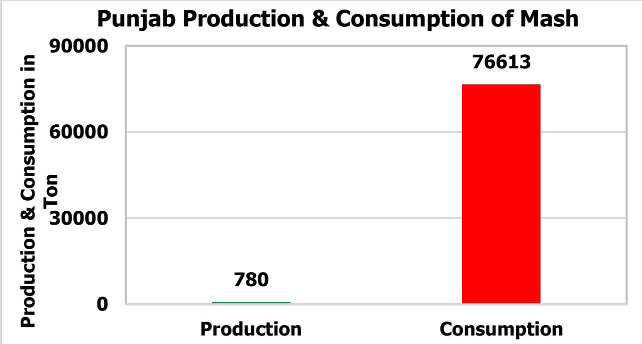
Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



Source: Crop Reporting Service Punjab

Provincial Production and Consumption:

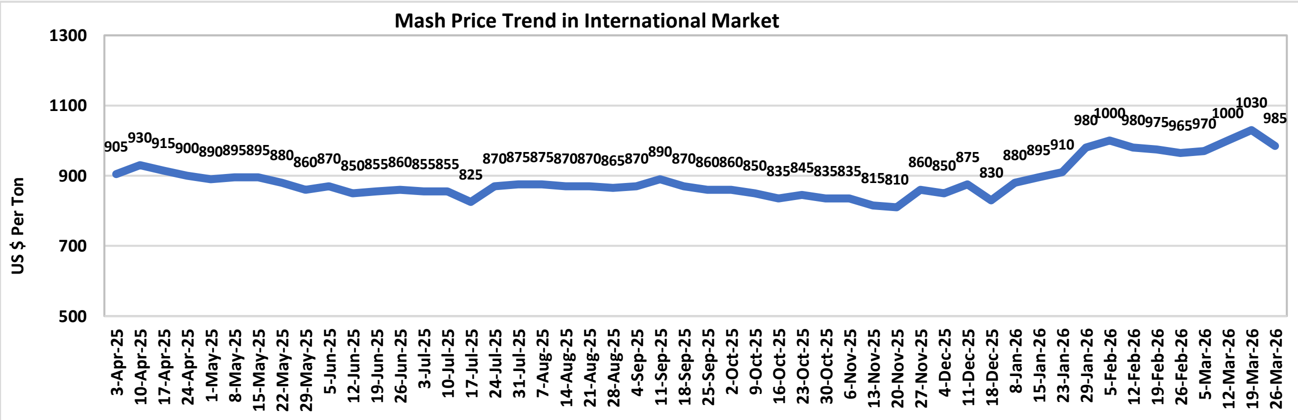
- In year 2024-25, production of mash in Punjab was registered at only 780 tons, against a provincial requirement of 76,613 tons, leaving a massive supply deficit of 75,833 tons.



Source: Crop Reporting Service Punjab & Agricultural Statistics of Pakistan

International Market Trend:

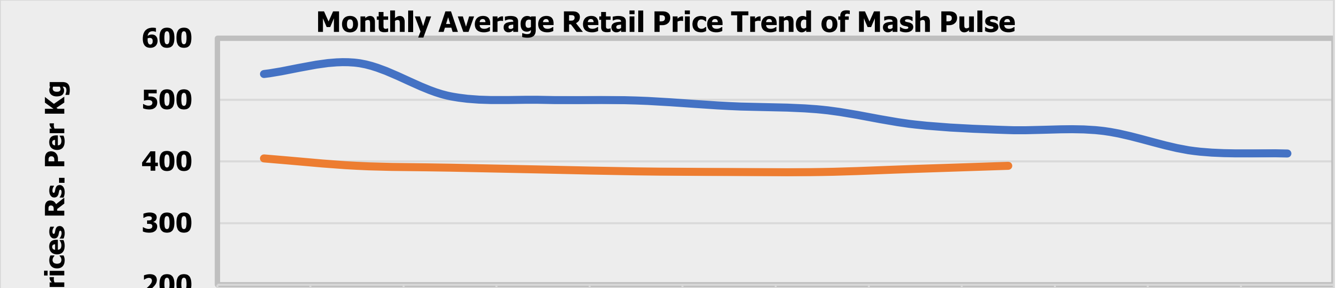
International prices of mash were showing increasing trend, howver recently decline is obsevred due to strat of production season in Mynamar . Current international price of mash is USD 985/ton.



Source: Global Pulses Confederation

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.393/kg during month of March-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			

SUPPLY MANAGEMENT ADVISORY

Assessment

Due to extremely low domestic production, the country remains heavily dependent on mash imports to meet its consumption needs. Previously, relatively low international prices facilitated smooth import, contributing to stable supply and prices in local markets. However, international prices were increasing, but recently some decrease is being observed due to start of local production season in Myanmar.

Forecast

International prices of mash has started to decrease due to start of its production season in Myanmar. With the passage of time, supply will improve in international markets, resultantly international price are likely to decrease and downward trend may also be observed in local markets.

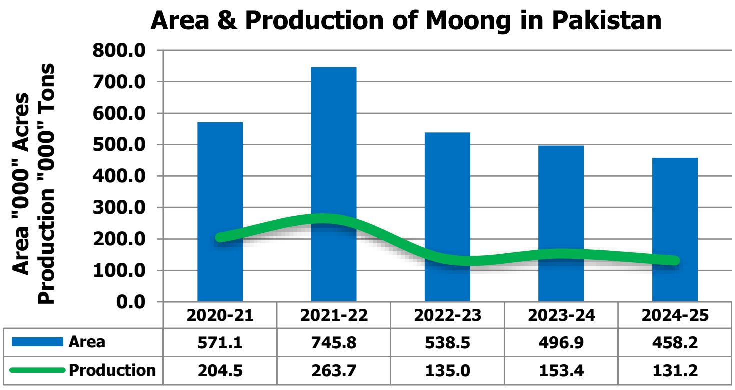
Advisory

- The District Administration, in coordination with the concerned EADAs (E&M) and Secretaries of Market Committees, should consider decline in international pries of mash due to start of production season in Myanmar, while fixing local prices of mash through meeting of DPCC.
- The District Administration may encourage importers / traders to undertake maximum import of mash keeping in view of start of production season in Myanmar and further expected decrease in intranational prices of mash.
- The stock position should be regularly updated to enable timely measures for maintaining stability in the supply and prices of mash.
- Price Control Magistrates (PCMs) should take strict action against overcharging retailers and ensure effective enforcement of notified retail prices.

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.

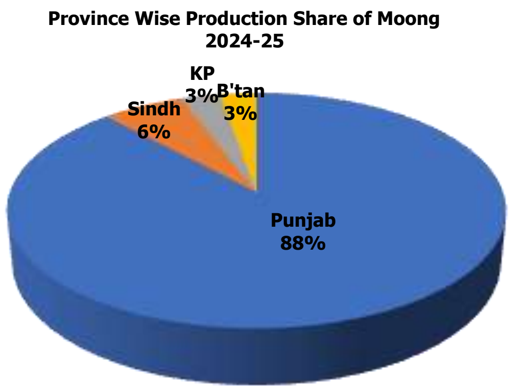


	2020-21	2021-22	2022-23	2023-24	2024-25
Area	571.1	745.8	538.5	496.9	458.2
Production	204.5	263.7	135.0	153.4	131.2

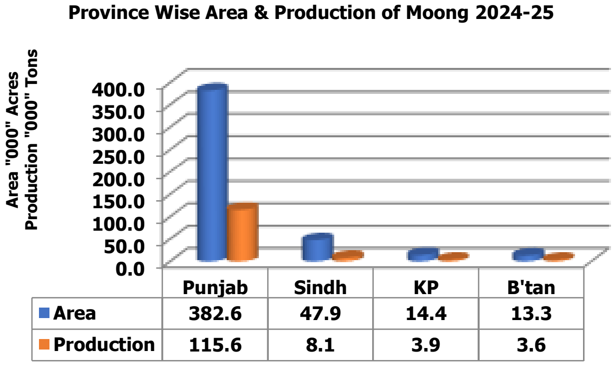
Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

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.

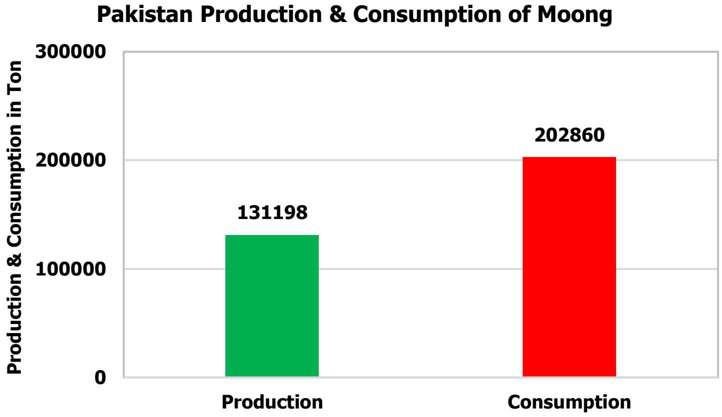


	Punjab	Sindh	KP	B'tan
Area	382.6	47.9	14.4	13.3
Production	115.6	8.1	3.9	3.6

Source:Agricultural Statistics of Pakistan

Domestic Production & Consumption:

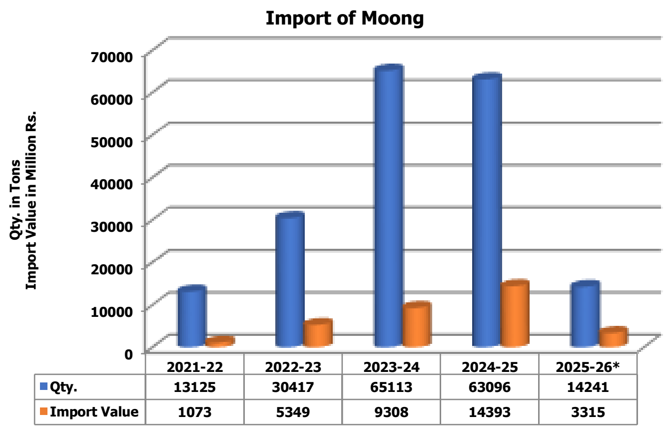
- During year 2024-25, Pakistan's domestic moong production reached 131,198 tons, falling short of the national consumption requirement of 202,860 tons and resulting in a supply deficit of 71,662 tons.



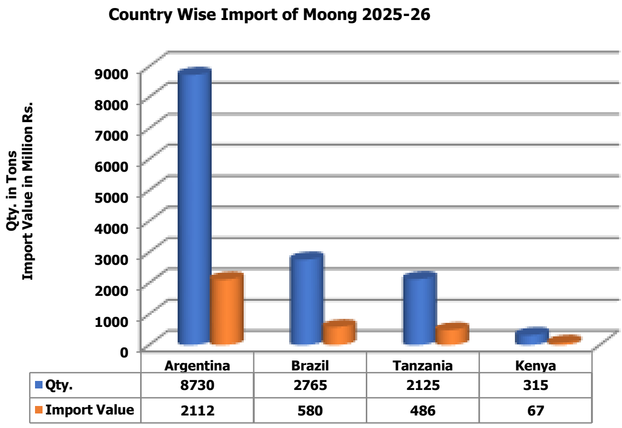
Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

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-February), imports reached 14,241 tons, at an expense of Rs. 3,315 million.
- Pakistan primarily sources moong imports from Argentina, Brazil, Tanzania, and Kenya.



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



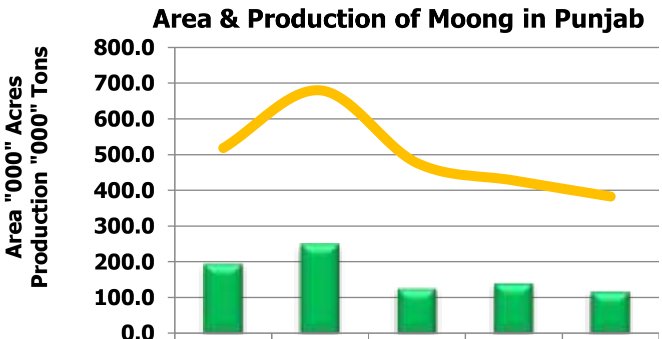
**=Import during July 2025 to February 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

PROVINCIAL OVERVIEW

Area & Production:

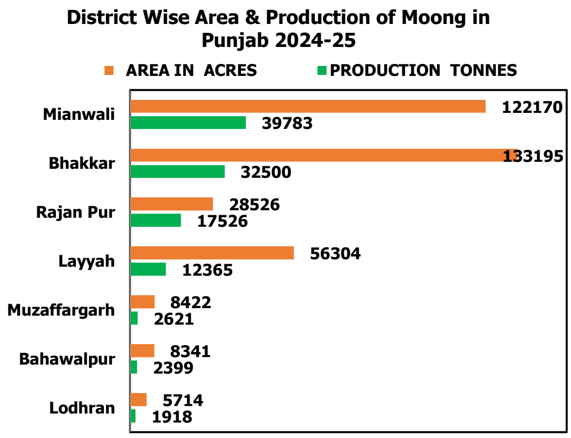
- During the last four years, cultivated area of moong in Punjab has shown declining trend and its production also remained unstable during this period.
- During year 2024-25, the cultivated area of moong in Punjab has contracted to 382,600 acres, showing a 10.5% reduction from the preceding year and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

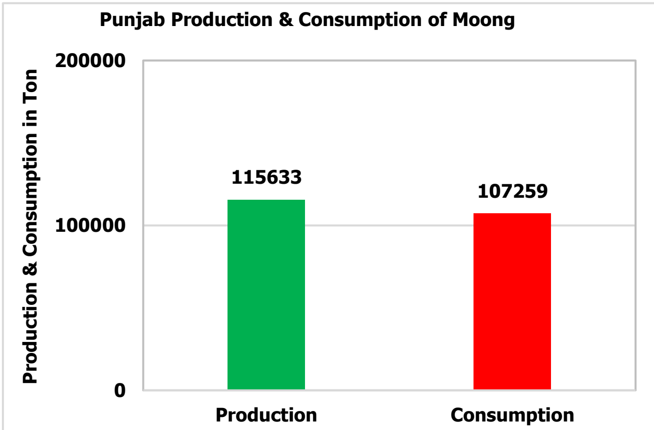
Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



Source: Crop Reporting Service Punjab

Provincial Production & Consumption:

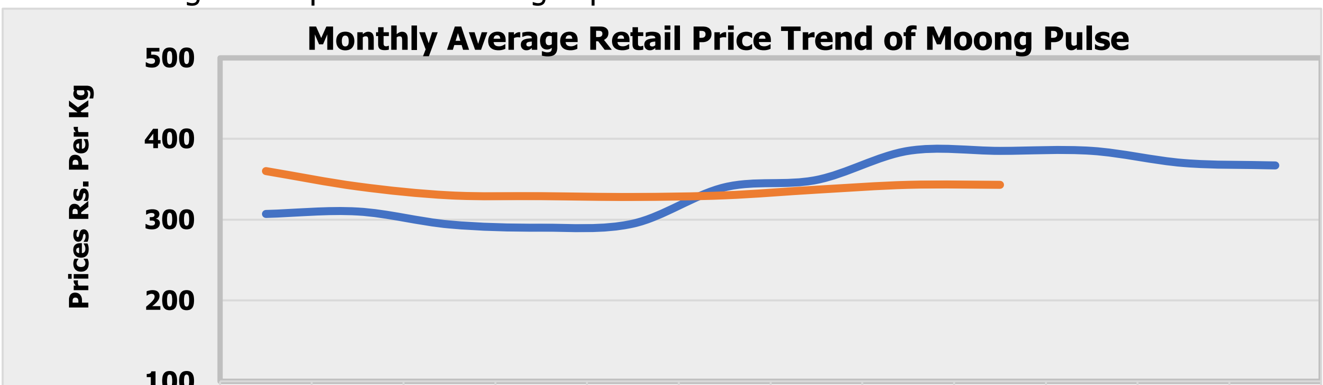
- During year 2024-25, provincial production of moong appeared to be 1,15,633 tons, showing surplus of 8374 tons as compared to provincial consumption requirement i.e. 1,07,259 tons.



Source: Crop Reporting Service Punjab & Agricultural Statistics of Pakistan

Market Prices

- The availability of the local moong crop has contributed to a stable supply and price situation in local markets. However, since the overall production is not abundant, prices have not declined significantly. In March 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			

SUPPLY MANAGEMENT ADVISORY

Assessment

Due to less local production, supply of moong is not as per requirement thus its prices are on higher side in local markets. However, current prices of moong are comparatively less than prices of last year.

Forecast

As a result of stress supply situation, prices of moong are expected to remain on higher side in local markets. However, a minor crop of moong is expected to arrive during May, 2026 which may cause stability in supply & price situation of moong.

Advisory

- District Administration with the help of concerned EADA (E&M) and Secretaries Market Committees closely observe the supply situation and arrange maximum supplies with the help of commission agents/traders.
- Price Control Magistrates should conduct regular inspections of retailers to ensure true implementation of notified rates in the markets.
- 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

Agriculture Marketing Information Service (AMIS),
Directorate of Agriculture Economics & Marketing

Contact Number: 042-99201094