FOOD IN FOCUS: MARKET ANALYSIS REPORT

(AUGUST, 2025)

PREFACE

The Department of Price Control and Commodities Management presents the tenth edition of its monthly market bulletin, "Food in Focus: Market Analysis Report." This edition offers a thorough assessment of the supply and price dynamics of essential food commodities, providing detailed insights into critical factors such as domestic production, consumption trends, import-export activity and fluctuations in global markets.

Additionally, this edition presents strategic recommendations for the District Administration and the Agriculture Department, underscoring the importance of vigilant monitoring of essential commodity supplies and the adoption of proactive measures to ensure their availability at affordable prices. It also highlights the continued insufficiency of domestic production in meeting national consumption requirements, thereby reinforcing the need for import reliance to bridge supply gaps.

We are confident that the analytical insights and policy directives presented in this report will equip stakeholders with the necessary knowledge to make informed decisions and seize emerging opportunities in an increasingly dynamic food market. It is our aspiration for "Food in Focus" to continue serving as an essential resource for all stakeholders of the food industry.

ABSTRACT

The core message of the Food in Focus report underscores that the Punjab province is currently in the off-season for most major vegetables i.e. potato, tomato and onion. As a result, local supplies are dwindling, and reliance on arrivals from other provinces i.e. KP & Balochistan and imports from Afghanistan is gradually increasing. Additionally, the ongoing monsoon season is further disrupting the supply chain. Thus, prices of key vegetables are likely to rise in future due to local off production season and ongoing intensive rainfalls. Seriatim detail of major vegetables and pulses is as under:

- In case of **Potato**, supply situation is anticipated to remain stable, which is attributed to significant production during year 2024-25. As currently Punjab is observing off season, thus main supply of potato is arriving from cold storages, leading to slight increase in prices due to inclusion of storage costs. Price of potato fresh is comparatively on the higher side due to its some arrival from KP. Addition of storage cost and transportation cost are main drivers behind increase in potato prices. Moreover, rainy season also affects the supply of potato fresh from KP.
- As regards **Tomato**, supply is under stress due to off production season in Punjab. Due to seasonal shift, tomato supplies are now coming from Balochistan and Khyber Pakhtunkhwa (KP). Recent intensive rainfalls and floods has disrupted supply from KP and supply is reliant on arrival from Balochistan along with import from Afghanistan. Resultantly, tomato prices are trending on higher side in local markets.
- Similarly, the production season of **Onion** in Punjab is close to end. However, now major supply of onion is arriving from Balochistan & KP and some from Afghanistan, which has resulted in smooth supply situation and kept the price almost stable with slight variations.
- Regarding **Pulses**, the production of gram in Punjab has declined to 98,000 tons during year 2024-25 indicating 28.9% decrease in contrast with the last year. However, production season of gram in Punjab has concluded. The production season for moong is expected to begin during last week of August, after which its supply is anticipated to be normal. In contrast, the supply of mash and masoor is entirely dependent on imports. Notably, international prices for gram, mash and masoor are currently on a downward trend, resultantly import of pulses is smoothly in progress leading to stability in supply & price situation of pulses in local markets.

Advisory Measures:

- Following seasonal variation in major vegetables, PAMRA Authority with the help of DO (PAMRA) / Secretaries Market Committee should persuade commission agents / traders to arrange maximum supplies from Balochistan, KP and Afghanistan especially in case of tomato & onion with the assistance of their counterparts based in other provinces and Afghanistan. Moreover, impact of rainy season on supplies also be carefully watched and sufficient supplies be arranged through proactive supply chain management.
- International prices of pulses are showing a declining trend, which should also be reflected in local prices. Therefore, DCs should refix prices in line with the decline in international prices and take prompt actions to ensure true implementation of retail notified prices of pulses.
- The Agriculture Department should prioritize the expansion in cultivation and production of major vegetables & Pulses by introducing high yielding, drought resistant and off-season seed varieties in a bid to gain self-sufficiency to meet consumption requirement of province and reduce dependency on other provinces as well as import.

MAJOR VEGETABLES

(Potato, Onion, Tomato)

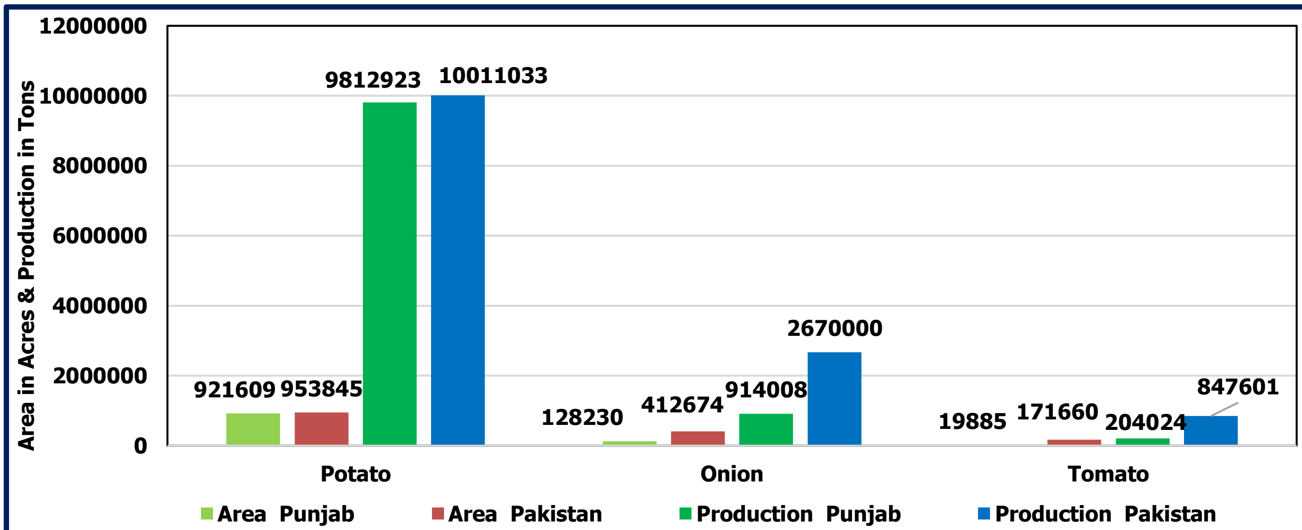
Punjab holds significant potential for cultivation and production of agricultural crops. However, despite its vast agricultural capacity and extensive cultivated area, the province remains unable to meet its consumption needs for most major vegetables such as tomato, onion, ginger, garlic and pulses. Total landholding of Punjab province is 43.33 million acres and approximately 30.96 million acres (71%) are under cultivation of agricultural crops. This section of the bulletin would cover only three major vegetables i.e. potato, onion and tomato which are essentially required for the culinary purposes. In a bid to get deep insight of market situation, information regarding production, consumption, import and export of essential vegetables has been sought from Agriculture Statistics of Pakistan and Crop Reporting Service Punjab. A commodity wise multifarious discussion is made as under:

1. AREA AND PRODUCTION (PROVINCE VS NATIONAL)

- Punjab is the leading **potato** producing province in Pakistan, contributing approximately 98% to the country's total production, while Khyber Pakhtunkhwa and Balochistan hold negligible shares. During year 2024-25, area under cultivation of potato has been assessed as 9,21,609 acres in Punjab and estimated area of 9,53,845 acres recorded at national level. Likewise, local production of potato in Punjab has been posted at 9.81 million tons in contrast with estimated production of 10.01 million tons at domestic level.

- In the case of **onion**, Punjab contributes 20% to the country's total onion production, ranking third among all provinces, following Balochistan and Sindh, which hold the largest shares at 37% and 34%, respectively. Khyber Pakhtunkhwa ranks last, with only a 9% share in domestic production. During year 2024-25, cultivated area of onion in Punjab has been recorded at 128,230 acres, compared to an estimated 412,674 acres at the national level. Punjab's onion output has been recorded at 914,008 tons, reflecting a 70% increase from last year's production of 475,000 tons, while the estimated national production for 2024–25 stands at 2.67 million tons.

- Regarding **tomato**, the cultivated area in Punjab for the year 2024–25 has been recorded at 19,885 acres, compared to an estimated 171,660 acres at the national level. In terms of domestic production, Balochistan holds the largest share at 47%, followed by Sindh with 24%, Punjab with 16%, and Khyber Pakhtunkhwa with 13%. Punjab's tomato production for year 2024–25 appeared to be 2,04,024 tons—reflecting a 58.6% increase over last year's output of 128,600 tons. Meanwhile, the estimated national production has been recorded at 847,601 tons.



Pakistan Production during 2024-25*=Provisional
Source: Agriculture Statistics of Pakistan and Crop Reporting Service Punjab (CRS)

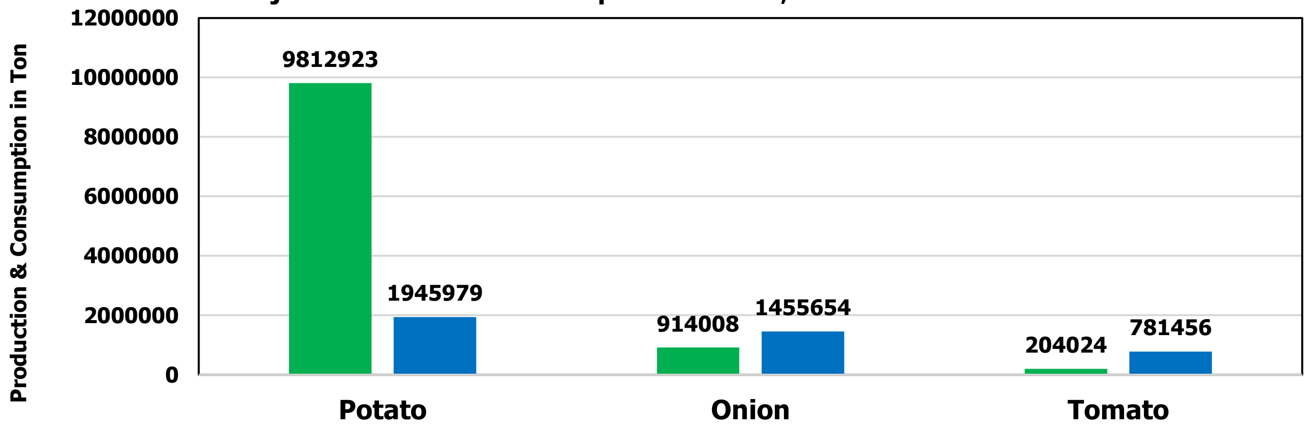
2. PRODUCTION IN CONTRAST WITH CONSUMPTION

- Punjab produces **potato** in surplus, enabling the country to earn valuable foreign exchange through significant exports. In the year 2024–25, local potato production in Punjab has been recorded at 9.81 million tons, while the province's consumption requirement stands at only 1.9 million tons. This results in a surplus of 7.91 million tons, which not only meets the demand of other provinces but is also utilized for exports and seed purposes.
- Regarding **onion**, Punjab's provincial production significantly falls short of its consumption needs primarily due to seasonal limitations (March to July). This shortfall leads to reliance on supplies from other provinces and imports to meet demand during the off-season. In the year 2024–25, local onion production has been recorded at 914,008 tons, while the consumption requirement driven by the province's large population is estimated at 1,455,654 tons, resulting in a production deficit of 541,646 tons.
- Similarly, the estimated local production of **tomato** for the year 2024–25 has been recorded at 2,04,024 tons, which is minimal compared to the consumption requirement of 781,456 tons, resulting in a deficit of 5,77,432 tons. Local production of tomato remains available only during April to June, therefore during off season

provincial consumption requirement of tomato are met through supply to from other provinces as well as import from Afghanistan & Iran.

- Most vegetables experience supply constraints due to seasonality & perishability. Potato is a storable commodity whose supply could be streamlined through cold storages round the year after closing production season. In contrast, onion & tomato don't have peculiarity of being stored and also experience seasonality, however through processing and value addition their supply could be ensured but for this purpose escalation in local production is required, especially of those varieties which are most suitable for processing.

Punjab Production & Consumption of Onion, Tomato & Potato Year 2024-25

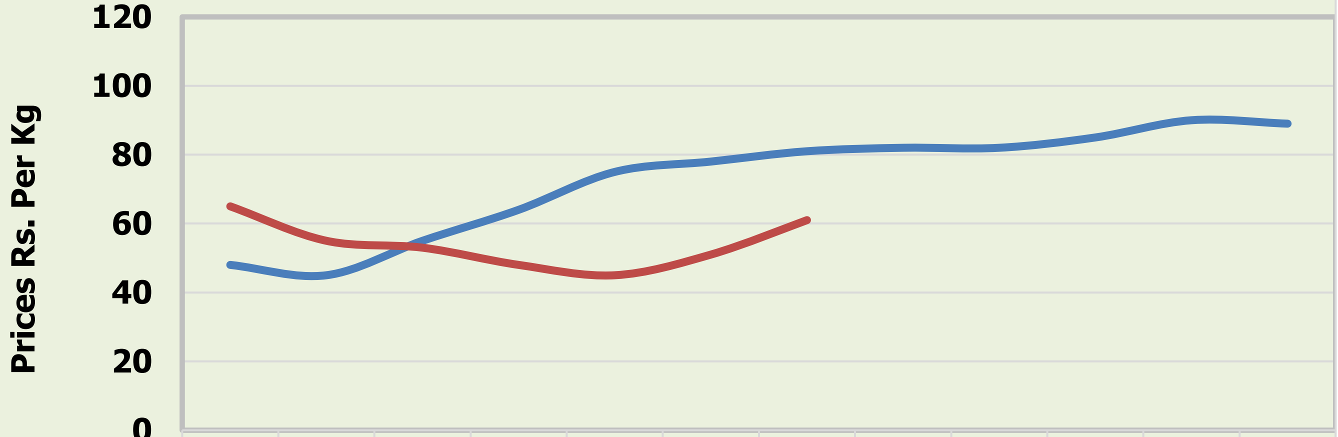


Source: **Production 2024-25;** by Crop Reporting Punjab
Population; Pakistan=241.499 Millions and Punjab=127.689 Million (PBS, Digital Census 2023)
Commodity Wise Monthly Per Capita Consumption: Potato=1.27 Kg/Person, Onion=0.95 Kg/Person & Tomato=0.51

3. Monthly Average Retail Prices (Current VS Last Year)

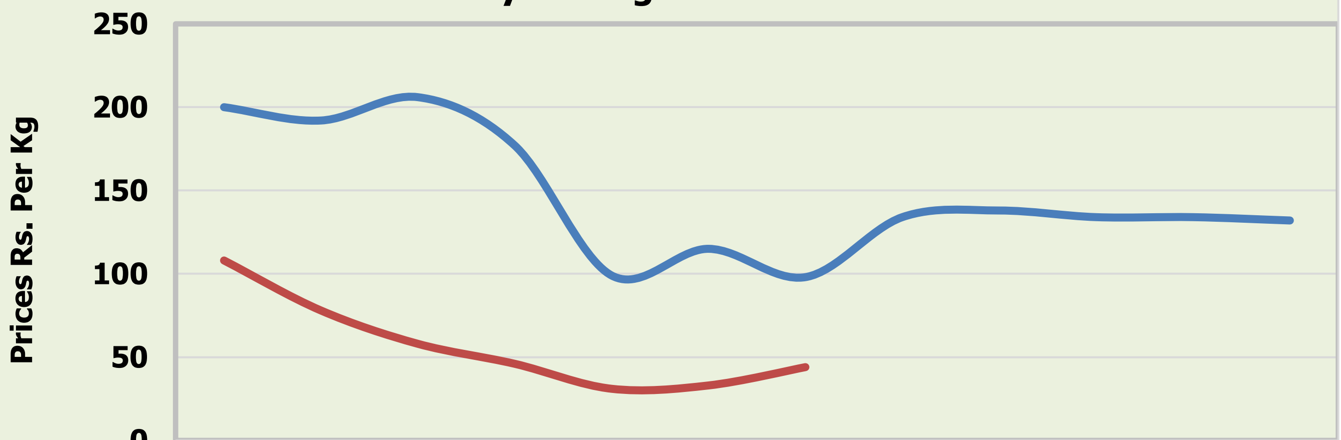
- As main supply of potato is arriving from cold storages, resultantly prices of **potato** store are showing increasing trend but yet on lower side as compared to last year. Monthly average retail price of potato store in Punjab during month of July is Rs.61/Kg, which was Rs.81/Kg during last year.
- **Onion** prices have also slightly increased due to end of local production season in Punjab and increase in dependency on arrival from other provinces i.e. Balochistan and KP. Monthly average retail price of onion in Punjab during month of July is Rs.44/Kg, which was Rs.98/Kg during last year.
- As regards **tomato**, local production season has lapsed and major supply is arriving from KP & Balochistan. Moreover, recent rainfalls and floods disturbed tomato supply from KP, which necessitated import from Afghanistan and engendered subsequent supply stress and price hike situation in tomato. Monthly average retail price of tomato in Punjab during month of July is Rs.69/Kg, which was Rs.145/Kg during last year.
- Prices of major vegetables are showing increasing trend in contrast with previous month, however prices are on lower side as compared to corresponding month of last year.

Monthly Average Retail Price Trend of Potato



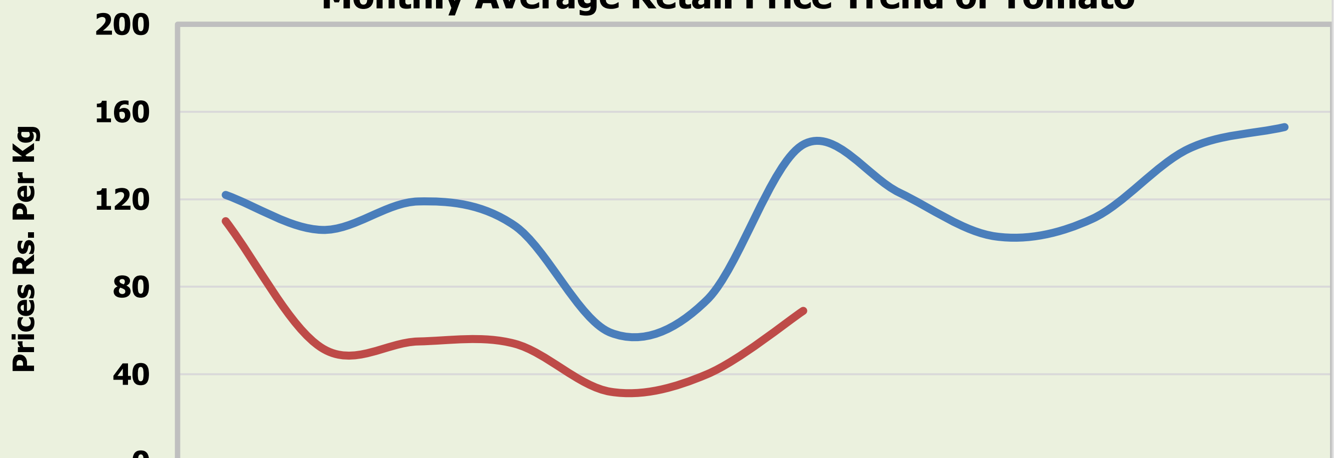
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2024	48	45	55	64	75	78	81	82	82	85	90	89
2025	65	55	53	48	45	51	61					

Monthly Average Retail Price Trend of Onion



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2024	200	192	206	177	99	115	98	134	138	134	134	132
2025	108	78	58	46	31	33	44					

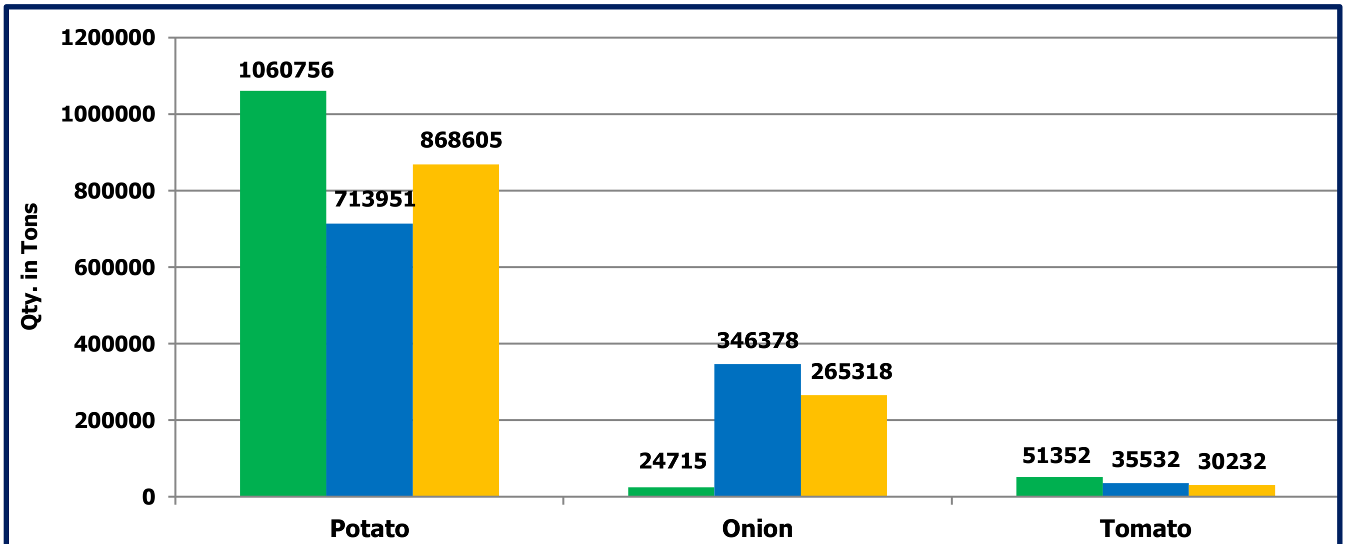
Monthly Average Retail Price Trend of Tomato



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2024	122	106	119	108	59	74	145	123	103	111	143	153
2025	110	52	55	54	32	40	69					

4. EXPORT INSIGHTS

- An overview of agricultural exports shows that Pakistan maintains a strong annual export volume of **potato**. During year 2023–24, potato exports stood at 713,951 tons, which increased to 868,605 tons in 2024–25. Pakistan exports potato to several countries, including Afghanistan, Sri Lanka, the United Arab Emirates, Qatar, Kazakhstan, Malaysia and Oman.
- In the case of **onion**, exports were recorded at 346,378 tons during year 2023–24, which declined to 265,318 tons in year 2024–25. Pakistan primarily exports onions to countries such as Malaysia, Sri Lanka, the United Arab Emirates (UAE), Qatar, Bangladesh, Singapore, and Oman.
- As regards **tomato**, exports were noted at 35,532 tons in 2023–24, which declined to 30,232 tons in 2024–25. Overall, tomato exports remain negligible.
- Potato is a most exportable vegetable which is followed by onion.

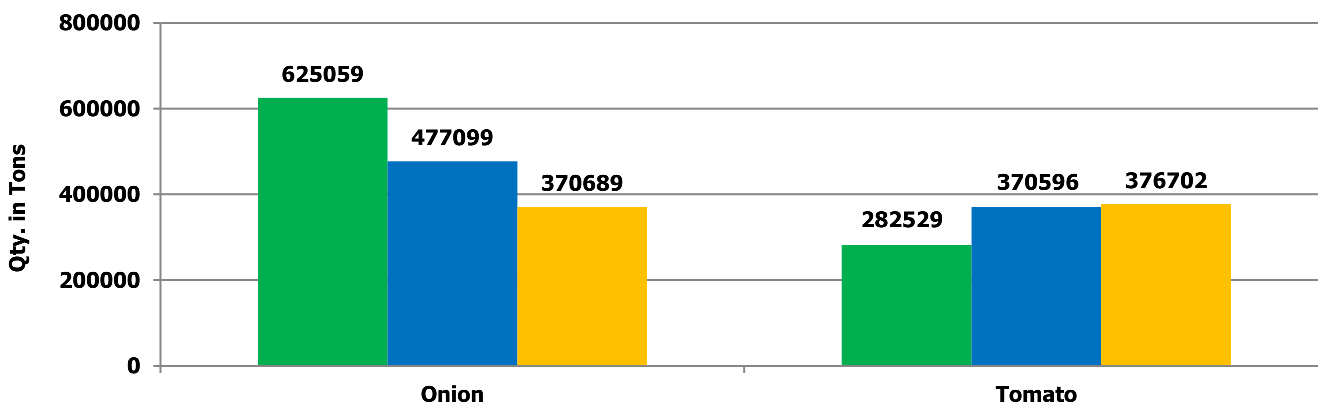


Source: Pakistan Single Window & PBS

5. IMPORT INSIGHTS

- Import of **onion** was recorded at 4,77,099 tons during year 2023-24, which was declined to 3,70,689 during year 2024-25, which is a good signal for the economy of the country. Pakistan primarily imports onion from Afghanistan and Iran.
- Likewise, **tomato** is also imported from other countries due to less domestic production. Import of tomato was assessed as 3,70,596 tons during year 2023-24, which has slightly increased to 3,76,702 tons during year 2024-25.

- As a result of less domestic production, onion & tomato are imported from other countries, however import of potato is not required being surplus in production.



Source: Pakistan Single Window & PBS

6. FORECAST AND MITIGATIVE STRATEGIES FOR BETTER SUPPLY CHAIN MANAGEMENT OF MAJOR VEGETABLES

i. POTATO

ASSESSMENT	• This year, potato production has been recorded at 9.813 million tons, indicating 19.14% increase over the previous year's production of 8.236 million tons. • Currently, Punjab is observing off production season of potato. Main supply is arriving from local cold storages and some supply of potato fresh is arriving from KP. • As a result of sufficient production, supply is stable, however prices are on a bit higher side due to the addition of storage cost. Price of potato fresh is comparatively higher due to very less quantum of its supply from KP.
FORECAST	• On account of significant production, potato supply is likely to remain stable with slightly higher prices. This situation seems to persist till November, 2025. • Next local production season will commence during November, afterwards prices are likely to decline due to availability of fresh supply of potato.
MITIGATIVE STRATEGIES	• DO (PAMRA) / Secretaries Market Committee should ensure their presence at the time of auctions in Agricultural Produce Markets to strictly monitor auction proceedings for transparent fixation of prices. • District Administration with the help of Market Committee may oversee stocks of potato stored in cold stores on regular basis, which is essential for effective supply chain management. • Prompt enforcement of price control measures through Price Control Magistrates are also important to reduce the gap between officially notified retail prices and prevailing open market rates.

ii. ONION

ASSESSMENT	• The production season of onion in Punjab has reached to end. • Main supply is arriving from Balochistan & KP, which ensured stable supply of onion in the local markets, however prices are on slightly higher side as a result of seasonal shift. Import from Afghanistan has also been commenced to improve the supply situation.
FORECAST	• During August to November, onion supply will remain available from Balochistan & KP along with import from Afghanistan. Due to start of Rainy season (Moonsoon) supply may be disturbed and prices may inflate in local markets. • During November, onion supply from Sindh will start to arrive, therefore no supply shock is expected in near future.
MITIGATIVE STRATEGIES	• PAMRA Authority with the help of concerned DO (PAMRA) / Secretaries Market Committees, should proactively engage commission agents to secure a continuous supply of onion from Balochistan and Khyber Pakhtunkhwa along with import from Afghanistan through coordination with their counterparts in those provinces and Afghanistan, especially during rainy season. • PAMRA Authority with the help of Market Committees should ensure transparent and fair price fixation mechanism through daily strict monitoring of the auction process in Agricultural Produce Markets. • Robust and comprehensive price control measures should be diligently enforced in all districts to prevent excessive profiteering and keep onion prices within reasonable and affordable limits.

iii. TOMATO

ASSESSMENT	• Local crop of tomato in Punjab has been exhausted. Main supply of tomato is arriving from Balochistan and some from KPK. • However, due to recent torrential rainfalls and floods, tomato supply from KP has sharply declined, which necessitated import of tomato. Import from Afghanistan is gradually increasing to overcome the supply gap. • As a result of seasonality, supply is arriving from other provinces along with import from Afghanistan, which resulted in surge in tomato prices in local markets.
FORECAST	• In case of tomato, stress supply period prevails during July to November. During this period supply will be available from KP and Balochistan along with import from Afghanistan. Thus, tomato prices are expected to remain on higher side. • Furthermore, Rainy season (Moonsoon) is in progress, which may disturb the supply situation and may set the prices to increase further in local markets. • However, Sindh crop will start to arrive during December, 2025 afterwards supply & price situation of tomato is expected to come in normal range.
MITIGATIVE STRATEGIES	• PAMRA Authority with the help of concerned DO (PAMRA) / Secretaries Market Committee, should engage commission agents to ensure sufficient and continued supply of tomato from KP & Balochistan as well as through import from Afghanistan with the help of their counterparts based in KP, Balochistan & Afghanistan. • The District Administration should take prompt actions to curb over-profiteering and implement the effective price control mechanisms in district. PAMRA Authority with the help of Market Committees should ensure transparent and fair price fixation mechanism through daily strict monitoring of the auction process in Agricultural Produce Markets. • Strict implementation of retail notified rates be ensured through increased inspections of retailers by Price Control Magistrates.

MAJOR PULSES

(Gram, Moong, Mash & Masoor)

Pulses are a rich source of protein and play a vital role in maintaining a balanced and healthy diet. Due to their widespread use across various cuisines, the demand for pulses remains consistently high in the market. Pakistan, particularly the Punjab province, possesses immense potential for pulse cultivation. However, both the country and the province face a significant shortfall in domestic pulse production relative to dietary needs. As a result of these insufficient production figures, Pakistan is compelled to bear a heavy import burden each year, leading to substantial expenditure of foreign reserves. This section of the bulletin will focus on the major pulses i.e. gram, moong, mash and masoor offering a detailed overview of their production, consumption, import and export statistics.

1. AREA AND PRODUCTION (PROVINCE VS NATIONAL)

- **Gram** production in Punjab is comparatively higher than in other provinces, with the province contributing 66% to the country's total output. It is followed by Balochistan, Sindh, and Khyber Pakhtunkhwa, which account for 18%, 10%, and 6% of the domestic production, respectively. Despite holding the largest share, Punjab remains unable to meet its year-round consumption needs, making imports necessary to bridge the supply gap. During year 2024-25, an area of 1.5 million acres has been recorded under cultivation of gram in Punjab province (13.9% less over last year) and estimated area of 1.75 million acres has been reported for gram production at national level (10.7% less over the last year). Domestic production of gram is experiencing declining trend since last three years. Gram production in Punjab has been posted at 98000 tons (28.9% less over the last year), in contrast with estimated national production of gram 175000 (16.3% less over the last year) which does not fulfill domestic consumption requirement.

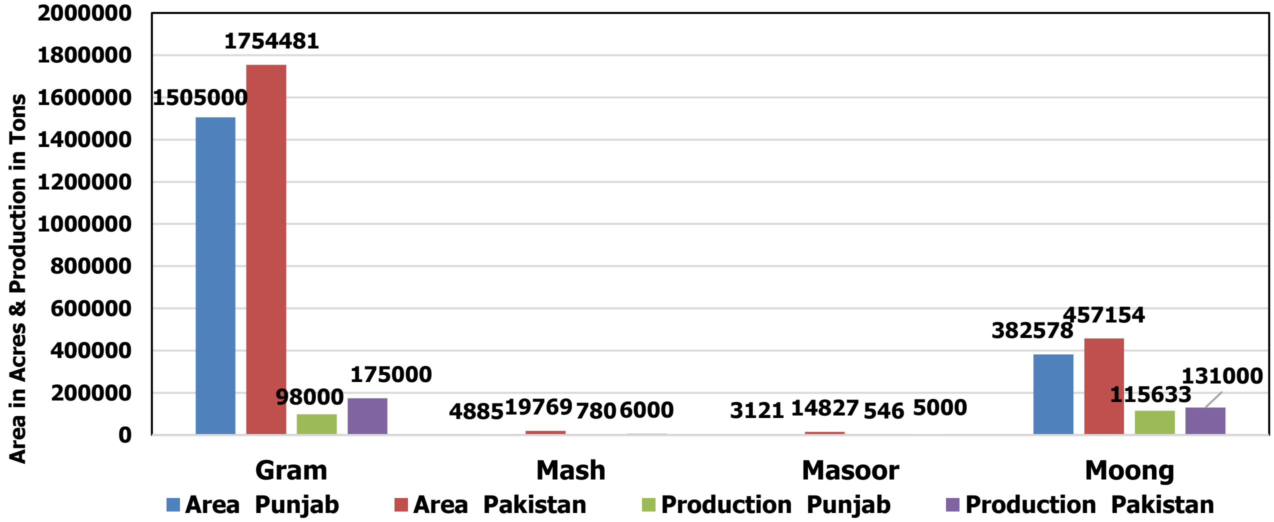
- As regards **moong**, the cultivated area in Punjab has been declining over the past three years, resulting in modest production levels. Although moong production is surplus at the provincial level, it remains in deficit at the national level. Punjab accounts for 91% of the country's total moong production, followed by Sindh with a 5% share, while the remaining 4% is equally contributed by Khyber Pakhtunkhwa and Balochistan.

MAJOR PULSES

- During year 2024-25, cultivated area of moong in Punjab has been assessed at 3,82,578 (9.8% less over last year's area i.e. 4,27,523 acres) and at national level estimated cultivated area of moong has been noted at 4,57,154 (7.96% less over last year area i.e. 4,96,736 acres). As regards production, Punjab received 1,15,633 tons production of moong (16.81% less over last year's production i.e.1,39,000 tons), whereas estimated national production is recorded at 1,31,000 tons (14.5% less over last year production i.e.1,53,360 tons).

- Domestic production of **mash** is extremely limited, leading to a heavy reliance on imports to meet approximately 92% of the country's consumption needs. Balochistan holds the largest share in domestic mash production at around 74%, followed by Khyber Pakhtunkhwa with 14%, and Punjab with 12%. During year-2024-25, in Punjab an area of 4885 acres has been utilized for cultivation of mash (25.2% higher over last year acreage i.e.3899 acres) and production of 780 tons has been achieved (14.3% higher over last year production i.e. 682 tons), whereas at Pakistan level estimated cultivated area of mash assessed as 19769 acres (14.18% higher over last year acreage i.e. 17,313 acres) and estimated national production recorded at 6000 tons (7.33% higher over the last year production i.e. 5590 tons).

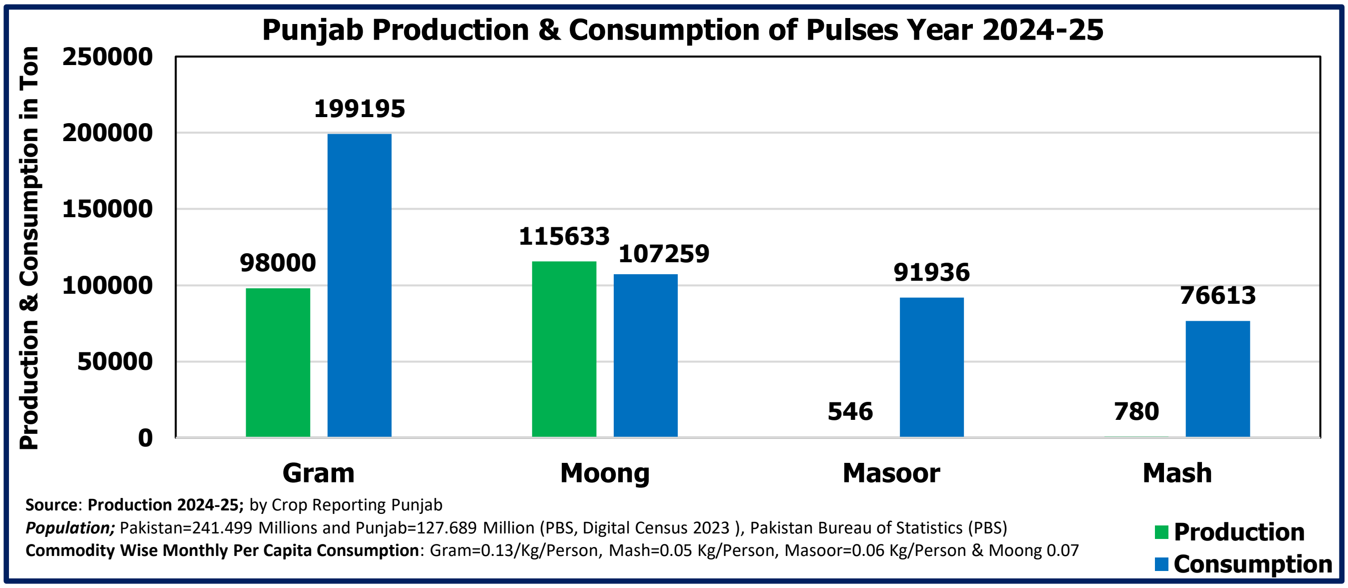
- **Masoor** cultivation and production are also limited in both Punjab and across the country. Due to minimal domestic output, approximately 97% of the national consumption requirement is fulfilled through imports. In terms of domestic production, Khyber Pakhtunkhwa contributes 56%, followed by Balochistan with 24%, Punjab with 12%, and Sindh with 8%. During year- 2024-25, Punjab cultivated masoor on an area of 3121 acres (32.9% higher over last year area i.e. 2348 acres) and attained production of 546 tons (4.71% less production over last year production i.e. 573 tons due to decrease in yield), whereas at national level estimated cultivated area recorded at 14,827 acres (2.89% less over last year area i.e. 15,269 acres) and estimated production of 5000 tons has been noted at 5000 tons (5.95% higher over last year production i.e. 4719 tons).



Pakistan Production during 2024-25*=Provisional
Source: Agriculture Statistics of Pakistan and CRS Punjab

2. PRODUCTION IN CONTRAST WITH CONSUMPTION

- Local **gram** production in Punjab falls short of meeting the province's consumption needs. During year 2024–25, production has been noted at 98,000 tons, whereas the consumption requirement stood at 199,195 tons, resulting in a deficit of 101,195 tons.
- In the case of **moong**, production exceeds provincial demand. During 2024–25, Punjab produced 115,633 tons against a consumption requirement of 107,259 tons, generating a surplus of 8,374 tons.
- **Mash** production in Punjab faces a significant shortfall. During year 2024–25, only 780 tons of Mash has been produced in Punjab, compared to a consumption requirement of 75,833 tons, resulting in a substantial deficit of 75,053 tons, which is met through imports.
- Similarly, **masoor** production remains negligible, leading to a huge supply gap. In year 2024–25, production has been recorded at just 546 tons, while the consumption requirement stood at 91,936 tons, resulting in a deficit of 91,390 tons.
- Gram and moong are locally produced; however, gram production is insufficient to meet consumption needs, necessitating imports to maintain a stable supply. In contrast, moong production is adequate to fulfill Punjab's requirements. On the other hand, the local production of mash and masoor is extremely limited relative to their consumption requirements, making imports essential to ensure their availability in local markets.

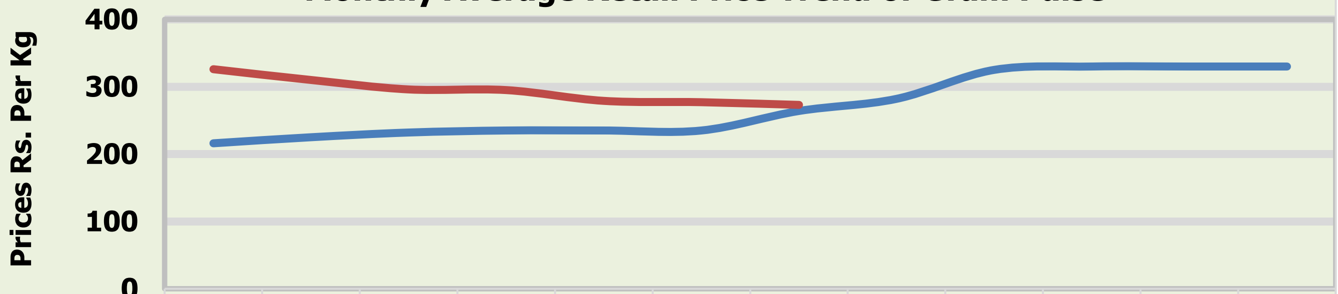


3. Monthly Average Retail Prices of Pulses (Current Vs Last Year)

- In case of **gram**, international prices have significantly decreased which resulted in smooth supply and subsequent decline in local prices of Gram. However, this year local prices of Gram remained on higher side as compared with previous year, which is due to 28.9% decrease in local production in contrast with last year. Monthly average retail price of Gram in Punjab during month of July is Rs.273/Kg, which was Rs.264/Kg during last year.
- As regards **mash**, its international prices also dropped down leading to steady imprt and stable supply stuatsion in local markets. Thus, local prics of Mash are showing decreasing trend over last month as well as last year. Monthly average retail price of Mash in Punjab during month of July is Rs.405/Kg, which was Rs.542/Kg during last year.
- Similarly in case of **masoor**, its international prices also showed slightly declining trend. Thus, its import is smooth and local prices of Masoor are exhibiting almost stable trend as compared to last month, however its prices are comparatively less in contrast with last year. Monthly average retail price of Masoor in Punjab during month of July is Rs.257/Kg, which was Rs.295/Kg during last year
- Prices of **moong** are showing slightly decreasing trend in local markets due to arrival of minor crop during month of May. However, prices of Moong remained on higher side as compared to last year as a result of 16.81% decrease in production. Monthly average retail price of Moong in Punjab during month of July is Rs.360/Kg, which was Rs.307/Kg during last year.

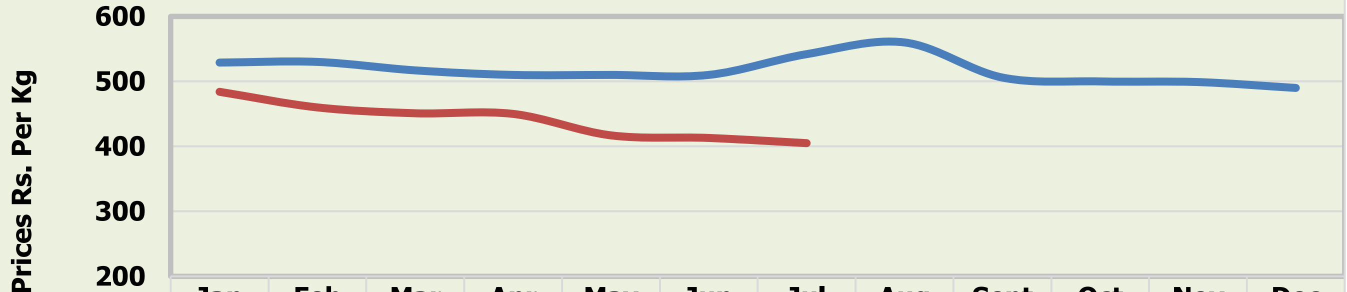
MAJOR PULSES

Monthly Average Retail Price Trend of Gram Pulse



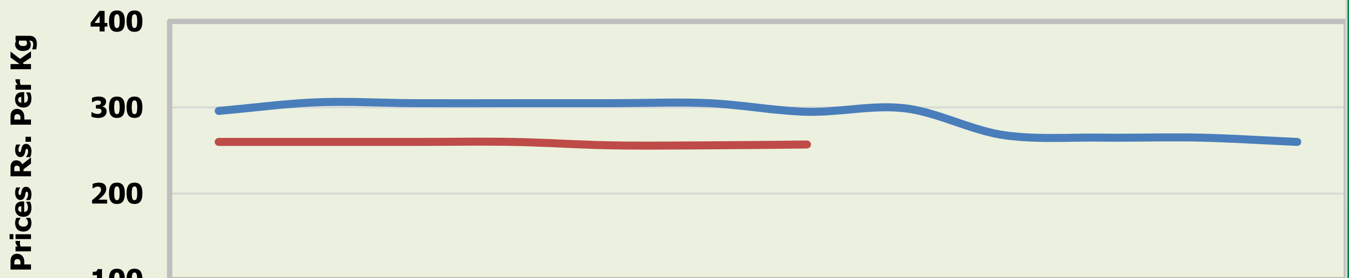
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2024	216	225	232	235	235	235	264	282	325	330	330	330
2025	326	310	296	295	279	277	273					

Monthly Average Retail Price Trend of Mash Pulse



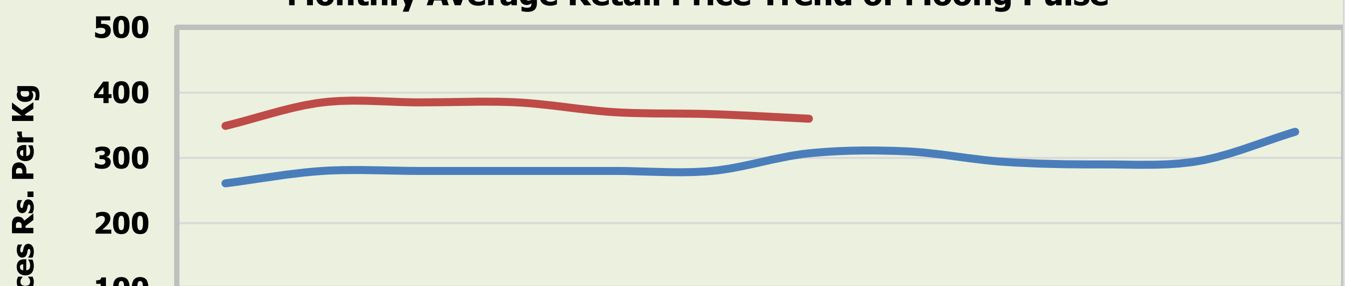
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2024	529	530	517	510	510	510	542	560	506	500	499	490
2025	484	460	451	450	417	413	405					

Monthly Average Retail Price Trend of Masoor Pulse



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2024	296	306	305	305	305	305	295	299	268	265	265	260
2025	260	260	260	260	256	256	257					

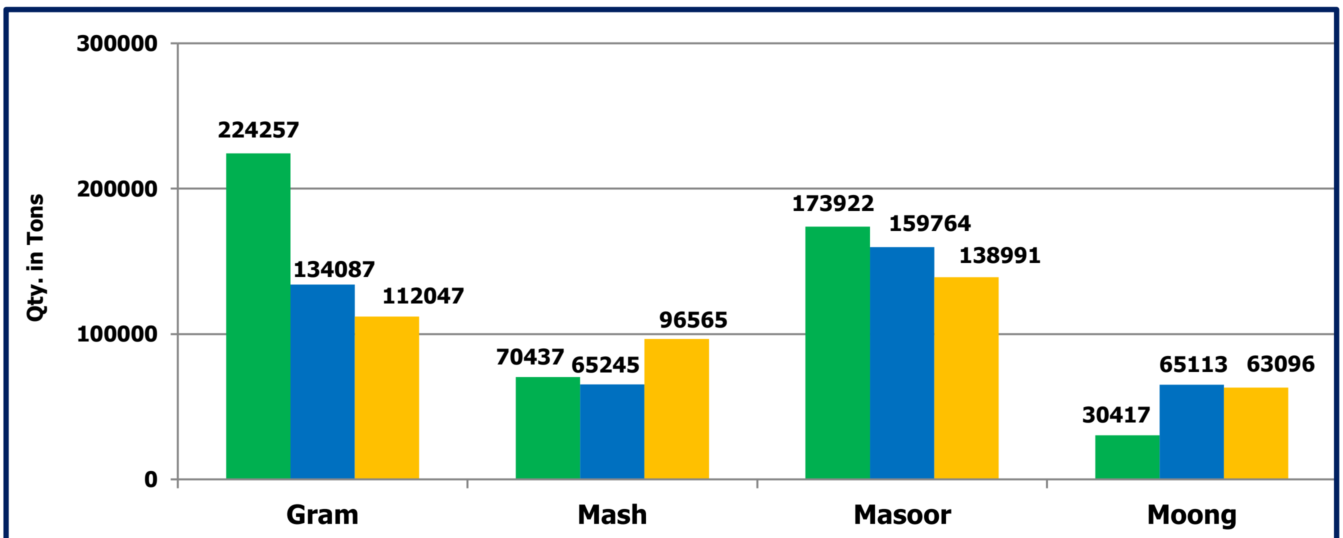
Monthly Average Retail Price Trend of Moong Pulse



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2024	261	280	280	280	280	280	307	310	294	290	295	340
2025	349	385	385	385	370	367	360					

4. IMPORT INSIGHTS

- An overview of import statistics shows that **gram** is imported to meet annual domestic consumption needs. During year 2024–25, Pakistan imported 112,047 tons of gram, compared to 134,087 tons in the previous year, indicating a gradual decline in import volume. Major sources of gram imports include Russia, Tanzania, Australia, Myanmar, the USA, Argentina, and Canada.
- In the case of **mash**, imports stood at 70,437 tons in 2022–23, slightly decreasing to 65,245 tons in 2023–24. However, in 2024–25, imports increased to 96,565 tons. Pakistan primarily imports mash from Myanmar, Afghanistan, Thailand, and Iran.
- **Masoor** imports were recorded at 173,922 tons in year 2022–23, declining to 159,764 tons in year 2023–24 and further decreased to 138,991 tons during year 2024–25, which reflects gradual decrease in import of masoor. The main countries supplying masoor to Pakistan are Canada, Australia, Russia and Afghanistan.
- At national level, domestic supply of **moong** is also inadequate to cater for its domestic consumption requirement. Therefore, moong is also imported to overcome supply deficit at national level. Pakistan imports moong from Afghanistan as per requirement. During year 2024-25, import of moong has been recorded at 63,096 tons which is comparatively less over last year import i.e.65,113 tons.

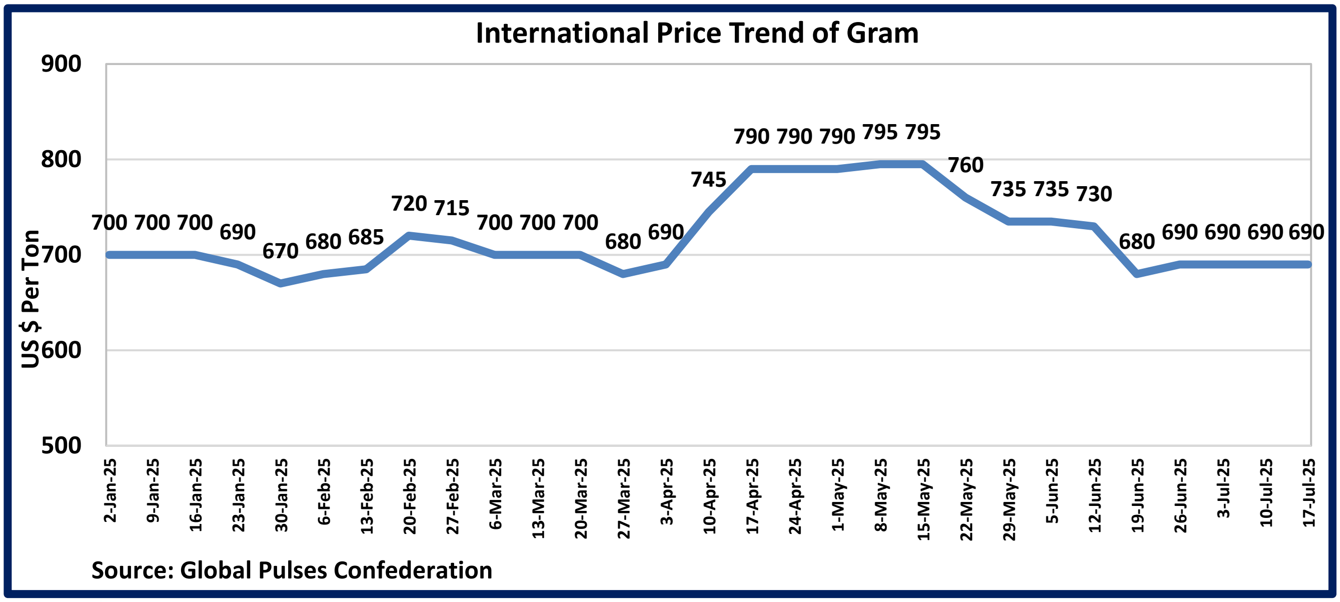


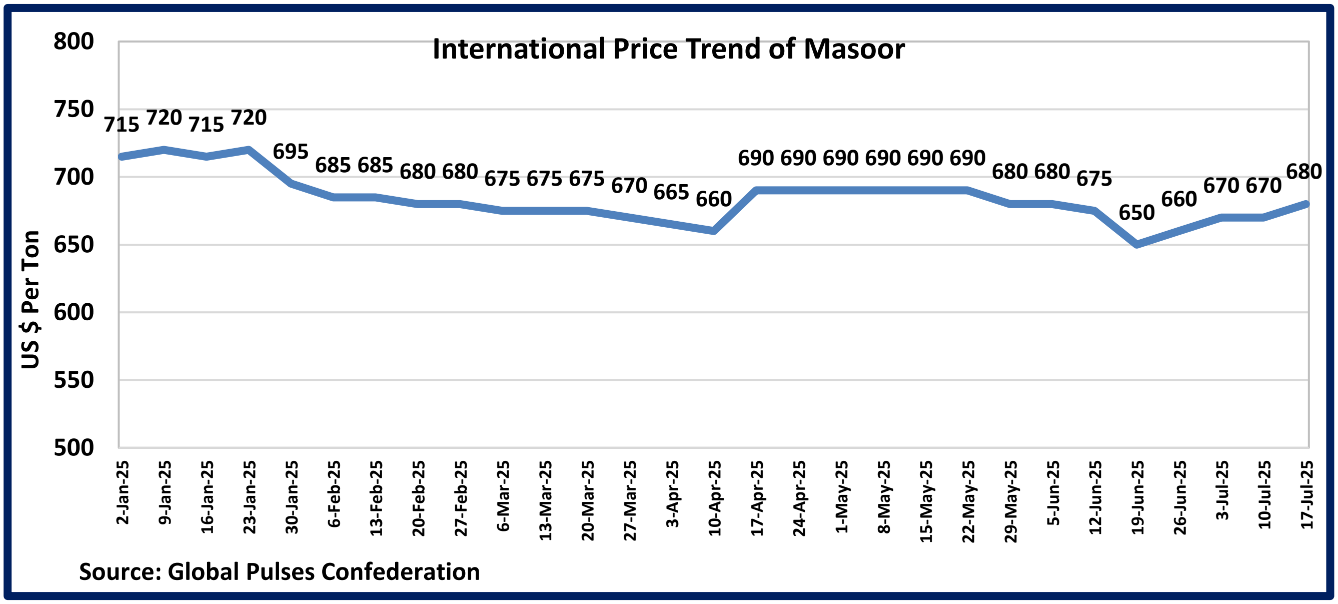
Source: Pakistan Single Window & PBS

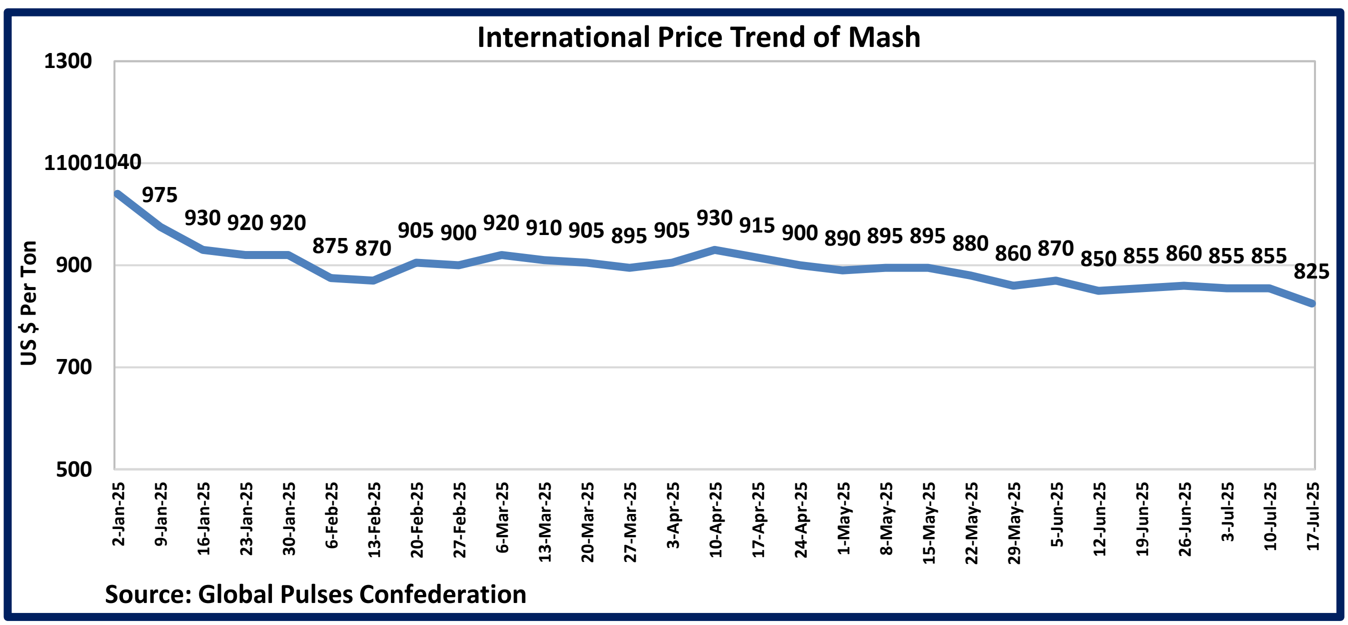
5. INTERNATIONAL PRICES INSIGHTS

International prices of pulses have been sought from Global Pulses Confederation, in order to assess price trends of pulses in international market. International prices of gram have sharply declined from US$ 795/ton to US$ 690/ton during last 3 months. Likewise, declining trend in international prices of Mash has been observed as its international prices has decreased from US$ 895/ton to US$ 825/ton during last two months. Similarly international prices of Masoor have declined from US$ 690/ton to US$ 680/ton during last two months. Graphical trends of international prices are given as under:

MAJOR PULSES







6. FORECAST AND MITIGATIVE STRATEGIES FOR BETTER SUPPLY CHAIN MANAGEMENT OF PULSES

i. GRAM

ASSESSMENT	• This year, Punjab's local gram production has been recorded at 98,000 tons, reflecting a significant 28.9% decline compared to last year's output of 138,000 tons. • However, India (the world's largest importer of pulses) has imposed a 10% import duty on gram effective from April 2025, aiming to protect domestic farmers and boost local production. Due to which demand in international market has been declined. • Moreover, Gram crop from Canada is about to begin. • Thus, Imposition of import duty by India and onset of production season in Canada, downward trend is being observed in international market i.e. prices of gram declined from US$ 795/ton to US$ 690/ton. • As a result of decline in international prices, import is smoothly in progress, resultantly supply & price situation of gram is stable in local markets.
FORECAST	• Gram crop from Canada will start to arrive during August- September and harvesting season in Australia will commence during October-November. • Due to availability of major crops from Canada and Australia, international prices of Gram are expected to decline further. • Resultantly, local prices of pulses are also likely to decrease in future
MITIGATIVE STRATEGIES	• In response to the decline in international prices, all Deputy Commissioners across Punjab should convene District Price Control Committee (DPCC) meetings to review and revise gram prices in line with the downward trend in global markets to pass on benefits of decrease in international prices to consumers. • In light of the continued reduction in gram cultivation and production, the Agriculture Department should prioritize expanding the area under pulse cultivation particularly gram and promote the adoption of climate-resilient and drought-tolerant varieties. • Regular monitoring of stock is necessary to evaluate supply situation of pulses in market. • Furthermore, District Administration should adopt strict measures to ensure the proper implementation of officially notified retail rates.

ii. MOONG

ASSESSMENT	• During year 2024-25, local production of moong has been recorded at 1,15,630 depicting 16.81% decrease over last year's production i.e.1,39,000 tons, which resulted in stress supply situation. • Currently, moong production season in Punjab is dormant. Main local crop of moong will start to arrive during end of August, which will stabilize the supply situation.

FORECAST	• Due to arrival of main local crop of moong during end-August, afterwards supply situation is likely to improve and price is expected to decline in local markets.
MITIGATIVE STRATEGIES	• The District Administration, in collaboration with the concerned District Officer (PAMRA) / Secretary Market Committee, should engage with local traders and commission agents to secure an adequate supply of moong, including through imports if necessary. • At the same time, District Administration may ensure continuous monitoring of moong stocks to effectively track supply and price trends in local markets.

iii. MASH

ASSESSMENT	• Domestic production of mash remains negligible, necessitating heavy import to meet domestic consumption requirements. Recently international prices are on lower side causing smooth import of mash, which subsequently resulted in stable supply & price situation in local markets. International prices have declined from USD$ 895/ton to USD$ 825/ton.
FORECAST	• As a result of low international prices, import of mash is likely to remain smooth. Thus, supply & price situation of mash is anticipated to remain stable in local markets.
MITIGATIVE STRATEGIES	• The District Administration, in coordination with the concerned District Officer (PAMRA) / Secretaries Market Committee, should remain in close contact with local importers, traders and commission agents to ensure a steady and uninterrupted supply of mash through regular imports. • The Agriculture Department should proactively work to expand the cultivated area under mash and promote the adoption of high yielding, climate-resilient and drought-tolerant varieties to make profitable cultivation for the farmers. • The District Administration should carefully monitor available stocks to ascertain supply situation and prevent any supply gap in future.

iv. MASOOR

ASSESSMENT	• Domestic production of masoor is insignificant, which generates dire need to import masoor from other countries. International prices of masoor have slightly decreased, resulting in stable supply & price situation of masoor in local markets. International prices have declined from USD$ 690/ton to USD$ 680/ton.
FORECAST	• Masoor crop from Canada will start to arrive during August- September and production season in Australia will commence during October- November. • Due to availability of major crops from Canada and Australia, international prices of masoor are expected to decline further. • Resultantly, local prices of pulses are also likely to decrease in future.
MITIGATIVE STRATEGIES	• The District Administration, with the assistance of relevant District Officer (PAMRA) / Secretaries Market Committee, should persuade local importers, traders and commission agents to ensure timely and consistent imports to stabilize local supply. • The Agriculture Department must prioritize the expansion of masoor cultivation and actively promote high yielding, climate-resilient and drought-tolerant varieties to gradually reduce reliance on imports.