



Price Control & Commodities
Management Department

Food in Focus Market Analysis Report

July, 2025





PREFACE

The Department of Price Control and Commodities Management presents the ninth 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.



Price Control & Commodities Management Department



ABSTRACT

The crux of report reveals that during these days Punjab province is experiencing off production season in most of major vegetables (Potato, Tomato & Onion), resultantly local supplies are declining and supply will be dependent on arrival from other provinces. Therefore, prices of major vegetables are likely to increase trend in future. Seriatim detail of major vegetables, minor vegetables and pulses is as under:

- In case of **Potato**, due to this year substantial production supply is expected to remain stable through arrival from cold storages. However, addition of storage cost may set price of potato store to increase. Whereas potato fresh will be available from KP but in limited, thus due to high transportation cost price of potato fresh is likely to remain on higher side.
- As regards **Tomato**, its production season in Punjab has been elapsed, and now supply from Khyber Pakhtunkhwa and Balochistan is gradually arriving. During July import from Afghanistan & Iran will also be required to overcome supply gap.
- Likewise, production season of **Onion** is also approaching to end and supply share from Balochistan & KP are increasing.
- **Garlic** season has reached to end during May, but local supply is available in markets along with import from China. However, some supply from Balochistan is also expected to arrive during coming month.
- In case of **Chilies**, their production season in Punjab will commence during July and in Sindh will begin during August, afterwards its supply & price situation is likely to remain stable.
- In case of **Pulses**, production season of Gram has been ended, moreover this year 2024-25 production has declined to 98,000 tons (28.9% less w.r.t last year). Production season of Moong will commence during August, afterwards its supply will turn to be normal. In case of Mash & Masoor, supply is entirely dependent on import. International prices of pulses (Gram, Mash & Masoor) are showing declining trend, providing an opportunity to undertake maximum import order as per consumption requirement.

Advisory Measures:

- Keeping in view seasonal shift in major vegetables, Deputy Commissioners should keep close liaison with commission agents / traders with the help of DO (PAMRA) / Secretaries Market Committee to arrange maximum supplies from KP and Balochistan with the help of their counterparts based in other provinces.
- Moreover, international prices of pulses are showing declining trend. Therefore, DCs should revise and reset prices of pulses through District Price Control Committee in line with decrease in international prices to pass the benefit of lower prices to the consumers.
- Agriculture Department should emphasize on expanding area and production of major vegetables and pulses by introducing high yielding and drought resistant seed varieties, to meet provincial consumption requirement and reduce burden of import.

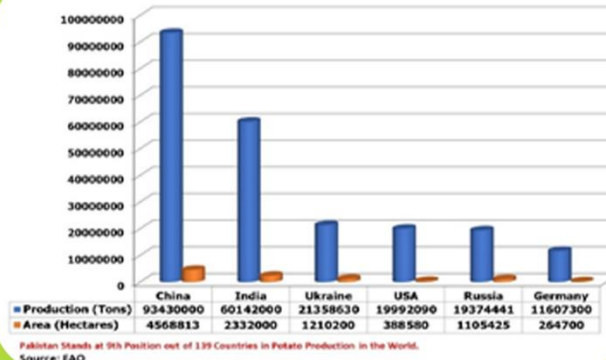
Potato



Global Overview

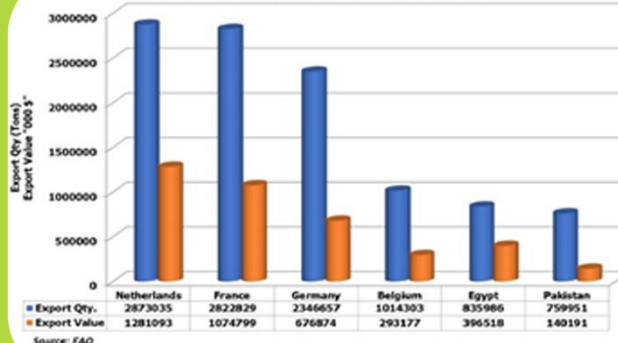
- The Food and Agriculture Organization (FAO) highlights that potato cultivation is widespread globally, with major contributions from countries such as China, India, Ukraine, the United States, Russia, and Germany.
- During year 2023, China ranked as the world's leading potato producer, yielding approximately 93.4 million tons from a cultivated area of 4.56 million hectares.

Country Wise Area & Production of Potato 2023

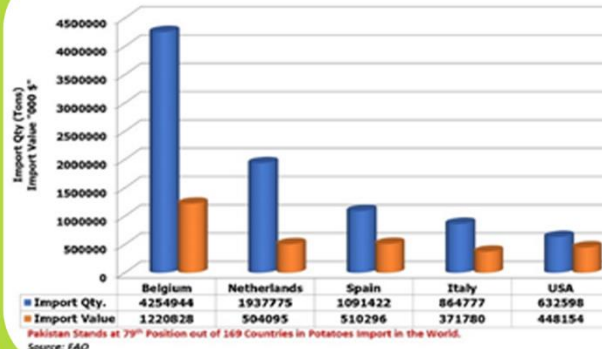


- During the same period, Pakistan emerged as the ninth-largest potato producer globally, achieving a total output of 8.3 million tons cultivated over 340,576 hectares.
- In the list of major exporters of potato, the Netherlands stood at first during year 2023, with export volume of 2.87 million tons having worth of USD 1,281 million. France secured the second position among the world's leading potato exporters, followed by Germany, Belgium, Egypt, and Pakistan. Pakistan ranked sixth globally, exporting 759,951 tons of potatoes with a total export value of USD 140.1 million.
- On the import front, Belgium emerged as the largest global importer of potato, followed by the Netherlands, Spain, Italy, and the United States.
- Pakistan ranked 79th among the world's potato-importing nations.

Country Wise Export Potatoes in the World 2023



Country Wise Import of Potatoes in the World 2023



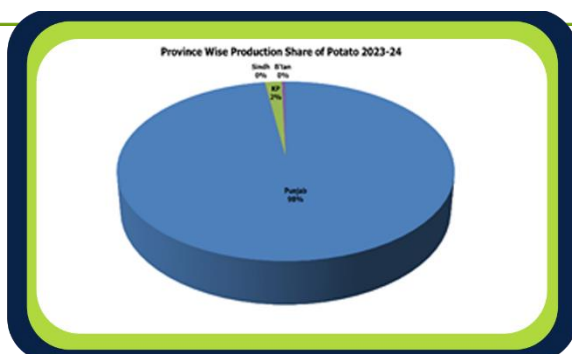
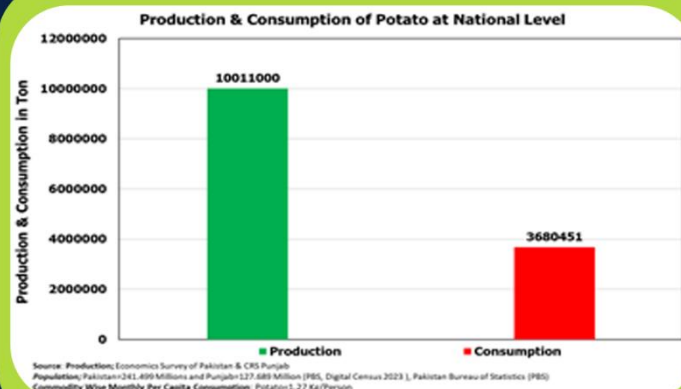
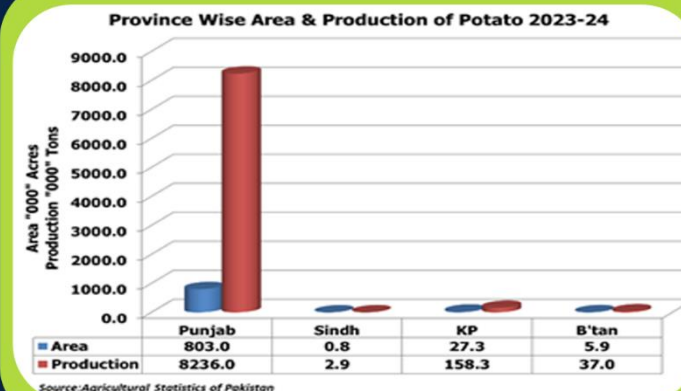
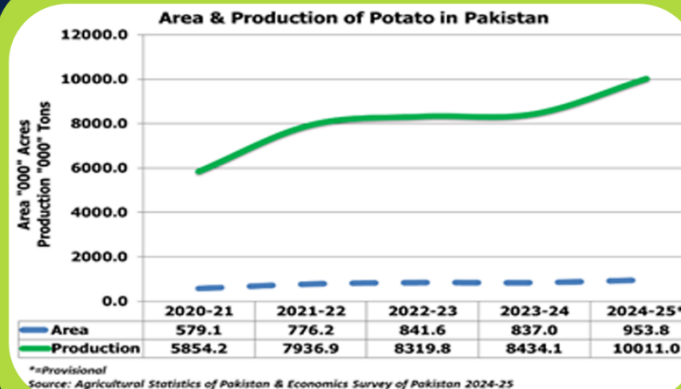


National Overview

- During year 2024-25, estimated domestic production of potato has been recorded at 10.011 million tons, which appeared to be a record-high production, reflecting a 18.70% increase compared to the preceding year.
- Over the past five years, both the cultivated area and total potato production have shown a consistent upward trend.

- This rise in production not only meets domestic consumption demands but also significantly contributes to foreign exchange earnings by enhancing export volumes.
- As per the Household Integrated Economic Survey 2018–19 by the Pakistan Bureau of Statistics, cited in the Agriculture Statistics of Pakistan, the country's domestic potato consumption is estimated at 3,680,451 tons.
- During the year 2024–25, Pakistan's potato estimated production reached to 10,011,000 tons, sufficiently meeting the nation's domestic consumption needs.

- In provincial comparison, Punjab province leads national potato production, contributing 98% of the total output, whereas the combined share of all other provinces stands at merely 2%. In Punjab potato was cultivated on 8,03,000 Acres, achieving a total production of 8.236 million tons during year 2023-24.

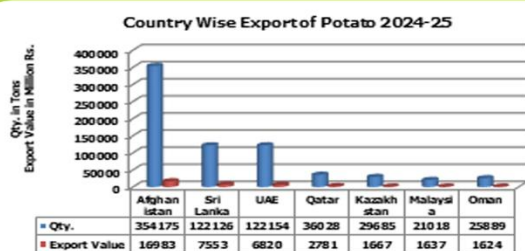




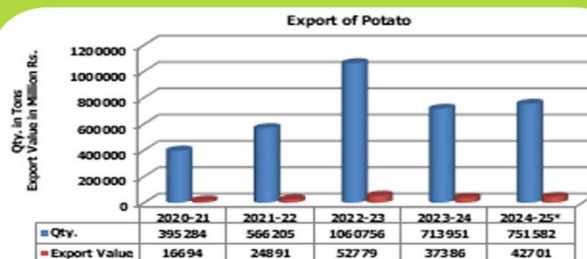
Price Control & Commodities Management Department



- Based on surplus production, Pakistan has emerged as a prominent global exporter of potato. During the fiscal year 2023–24, the country exported 713,951 tons of potato, generating export earnings of Rs. 37,386 million. Between July and May of the year 2024–25 period, potato exports rose to 751,582 tons, yielding Rs. 42,701 million in revenue. Key export destinations include Afghanistan, Sri Lanka, the United Arab Emirates, Qatar, Kazakhstan, Malaysia and Oman.

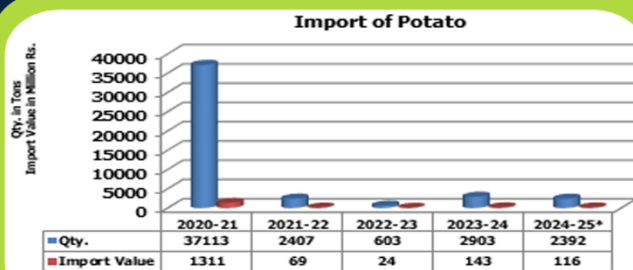


*=Export during July 2024 to May 2025
Source: PBS & Pakistan Single Window

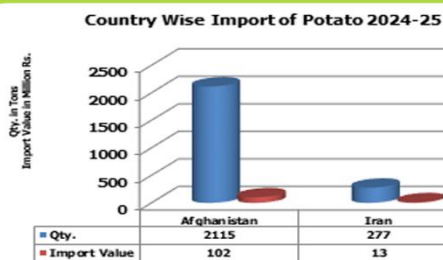


*=Export during July 2024 to May 2025
Source: PBS & Pakistan Single Window

- Due to ample domestic production, Pakistan has no need to import potato for consumption. However, a limited quantity is imported exclusively for seed purposes. In year 2023–24, potato import was recorded at 2,903 tons, while during year 2024-25 (July–May), 2,392 tons have been imported thus far, primarily from Afghanistan and Iran.



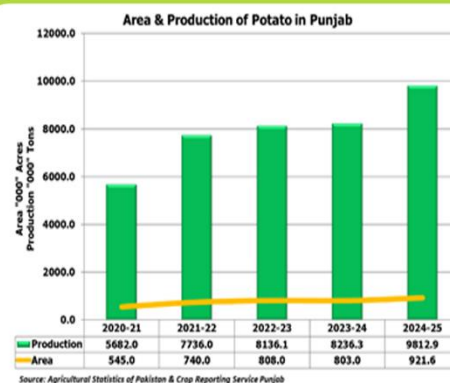
*=Import during July 2024 to May 2025
Source: PBS & Pakistan Single Window



*=Import during July 2024 to May 2025
Source: PBS & Pakistan Single Window

PROVINCIAL OVERVIEW

- Punjab serves as the cornerstone of Pakistan's potato production, accounting for 98% of the total domestic output.
- The province not only meets its own consumption needs but also fulfills country's overall demand for potato.
- During period from year 2020–21 to year 2024–25, potato production in Punjab has shown consistent growth, indicating an increase of 72.7% during this period.



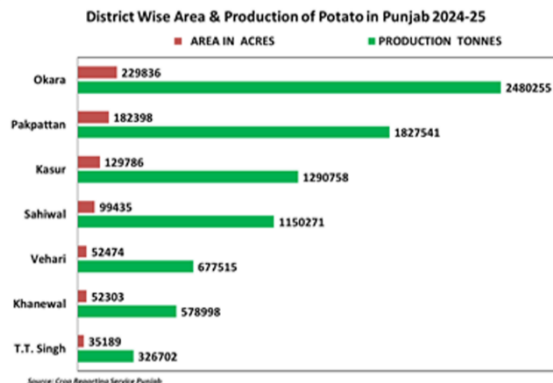
Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



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- Okara district holds the top position in Punjab's potato production, boasting an impressive yield of 2.480 million tons. It is followed by Pakpattan, Kasur, Sahiwal, Vehari, Khanewal and Toba Tek Singh as other major contributing districts.



- Due to seasonal variations, the potato production cycle differs across provinces in Pakistan. The key potato-producing districts of all provinces along with their corresponding production seasons, are detailed 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

- Currently, main supply of potato is arriving from cold storages. Supply of potato store is stable, however due to addition of storage cost its price is showing slightly increasing trend. Monthly average retail price of potato store in Punjab is recorded at Rs.51/Kg during June. However, fresh potato is arriving from KP but in limited quantity, therefore price of potato fresh is comparatively on higher side:



Supply Management Advisory

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. Due to this substantial increase, supply situation of potato is stable in the markets. However, main flux of potato supply is arriving from cold storages, due to adding storage cost price of potato store is depicting slightly increasing trend. Moreover, fresh potato is arriving from Khyber Pakhtunkhwa but in nominal volume, thus price of fresh potato is higher in local markets.



Forecast

- As a result of significant production, supply is stable in the local markets. However, as main supply of potato will be available from cold storages during July to November, thus price of potato store will depict increasing trend on account of addition of storage cost. Moreover, fresh potato will arrive from KP with less supply and high price.



Advisory

- The District Administration, with the help of concerned DO (PAMRA) / Secretaries Market Committee, should ensure maximum release of potato stocks from local cold storages in accordance with consumption needs, to maintain prices within a reasonable range.
- Regular updates on the stock position of potato stored in cold storages are also crucial for effective supply monitoring under the supervision of District Administration.
- Additionally, swift enforcement of price control measures is vital to reduce the gap between notified retail price and open market price.
- Price Control Magistrates must intensify their inspection efforts to ensure fully implementation of officially notified rates in open markets.



Tomato

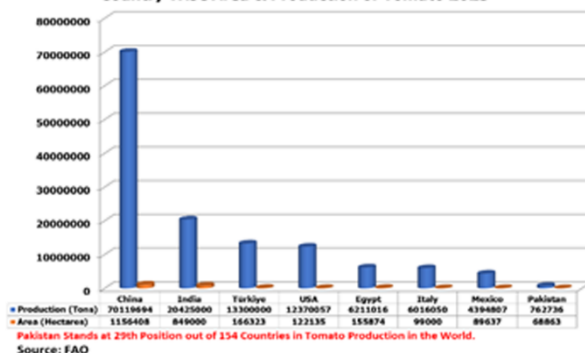


Global Overview

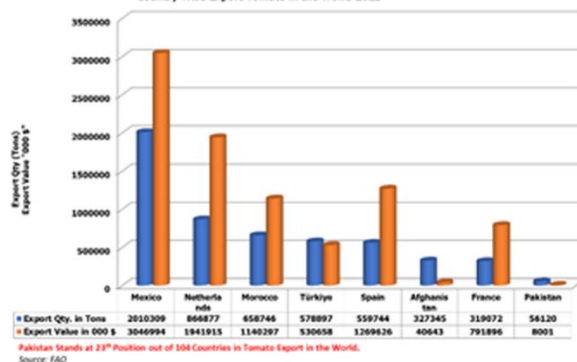
- The Food and Agriculture Organization (FAO) reports that tomato is cultivated in 154 countries worldwide.
- The leading tomato-producing countries globally include China, India, Türkiye, the United States, Egypt, Italy and Mexico.
- China dominated global tomato production, harvesting 70.11 million tons from a cultivated area of 1,156,408 hectares during year 2023.
- Pakistan ranked 29th among 154 tomato-producing countries, with a total output of 762,736 tons grown on 68,863 hectares.

- A wide range of countries participate actively in the international tomato trade.
- In 2023, Mexico stood as the top global exporter of tomatoes, exporting 2.01 million tons valued at USD 3,046 million.
- Pakistan ranked 23rd out of 104 tomato-exporting countries, with exports totaling 56,120 tons and generating USD 8.001 million in revenue.
- In year 2023, the United States emerged as the largest importer of tomato, with an import volume of 2.014 million tons valued at USD 3,279.2 million.
- Other major tomato-importing countries included Germany, France, Iraq, the United Kingdom, Pakistan and Russia.
- As a deficit producer, Pakistan depends significantly on imports to fulfill domestic tomato demand. It ranked sixth among the top tomato-importing countries during year 2023, importing 356,565 tons at a cost of USD 50.67 million.

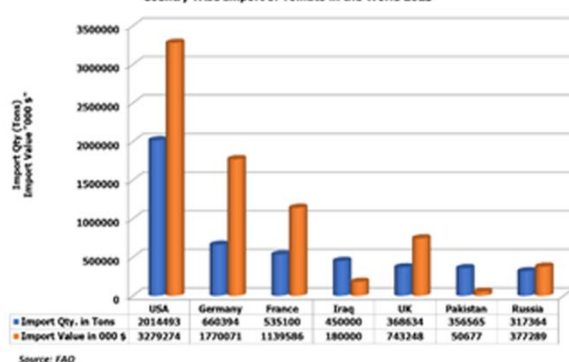
Country Wise Area & Production of Tomato 2023



Country Wise Export Tomato in the World 2023



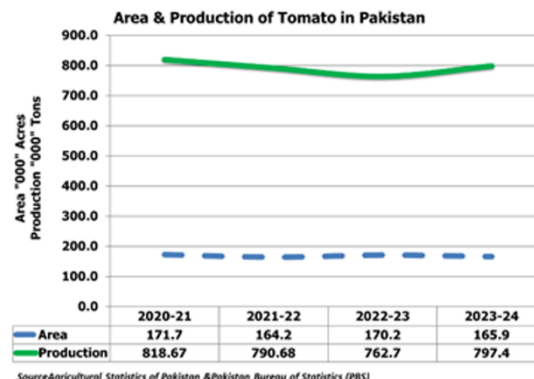
Country Wise Import of Tomato in the World 2023



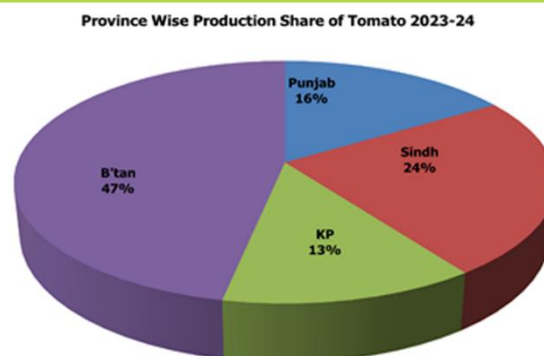


National Overview

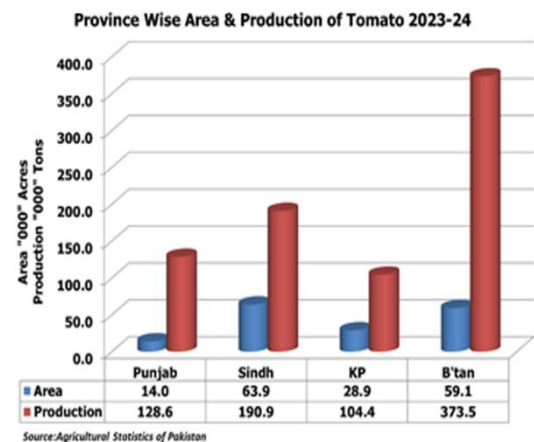
- Over the past three years, national tomato production and the area under cultivation have remained relatively stable, experiencing only slight variations.
- In the fiscal year 2023–24, domestic tomato production increased to 797,400 tons—marking a 4.5% rise compared to the previous year. However, the cultivated area declined by 2.52%, dropping to 1,65,900 Acres.



- Although domestic tomato production has seen modest growth, but it continued to fall short of meeting national demand. Estimated consumption stands at 1,477,977 tons, while current production is limited to 797,400 tons—leaving a substantial deficit of 680,577 tons. This shortfall reinforces the need for import reliance to stabilize tomato supply in the markets.
- Balochistan holds the distinction of being Pakistan's top tomato-producing province, accounting for 47% of the domestic production. It is followed by Sindh with 24%, Punjab contributing 16%, and Khyber Pakhtunkhwa supplying the remaining 13%.



- During year 2023–24, Balochistan led tomato production with output of 3,73,500 tons harvested from 59,100 acres. Sindh followed with an output of 190,900 tons from 63,900 acres.
- Punjab produced 128,600 tons of tomato from a cultivated area of 14,000 acres.
- Khyber Pakhtunkhwa (KP) recorded the lowest production among provinces, harvesting 104,400 tons from 28,900 acres.

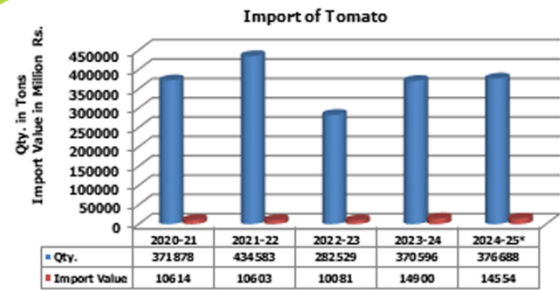




Price Control & Commodities Management Department

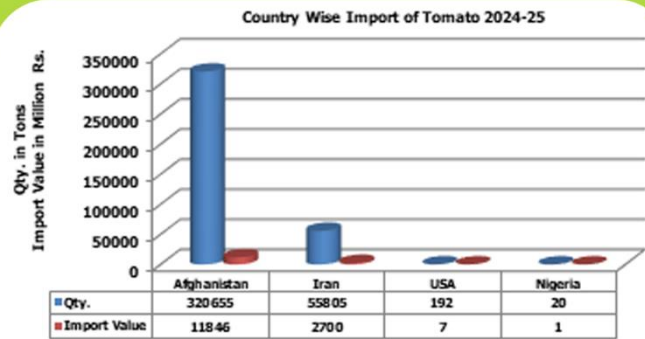


- In the fiscal year 2023–24, Pakistan imported a total of 370,596 tons of tomato, incurring a cost of Rs. 14,900 million.
- However, during the year 2024–25 (July to May), import volumes rose to 376,688 tons, with an associated expenditure of Rs. 14,554 million.



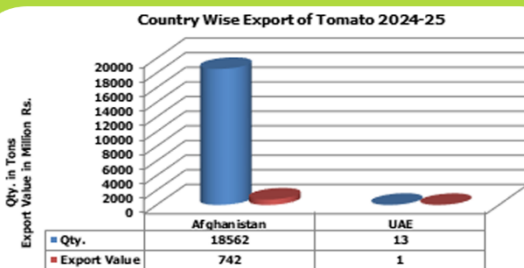
*=Import during July 2024 to May 2025
Source: PBS & Pakistan Single Window

- Pakistan primarily sources its tomato imports from Afghanistan, Iran, the USA and Nigeria, with Afghanistan and Iran accounting for the dominant share.
- During July to May of the year 2024–25, imports from Afghanistan reached 320,655 tons at a cost of Rs. 11,846 million. An additional 55,805 tons were imported from Iran, costing Rs. 2,700 million. Imports from the USA and Nigeria remained marginal.
- Interestingly, while Pakistan imports substantial quantities of tomato to satisfy domestic demand, it also engages in tomato exports—contributing to the country's foreign exchange earnings.

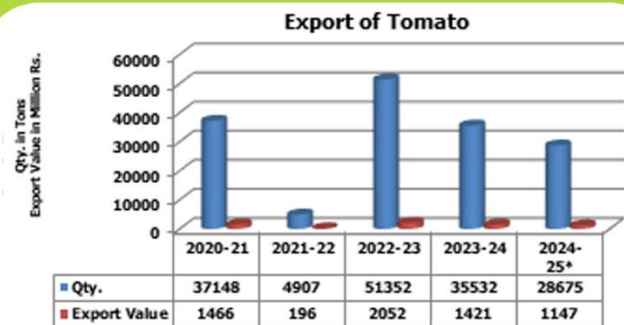


*=Import during July 2024 to May 2025
Source: PBS & Pakistan Single Window

- In the fiscal year 2023–24, Pakistan exported 35,532 tons of tomato, generating export revenue of Rs. 1,421 million. However, during the July to May period of year 2024–25, exports reached 28,675 tons, valued at Rs. 1,147 million. The bulk of these exports were directed to Afghanistan, with a modest share sent to the United Arab Emirates.



*=Export during July 2024 to May 2025
Source: PBS & Pakistan Single Window

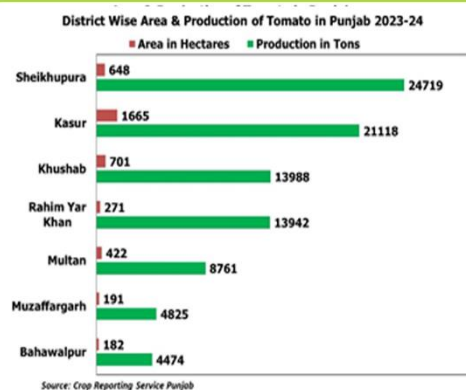
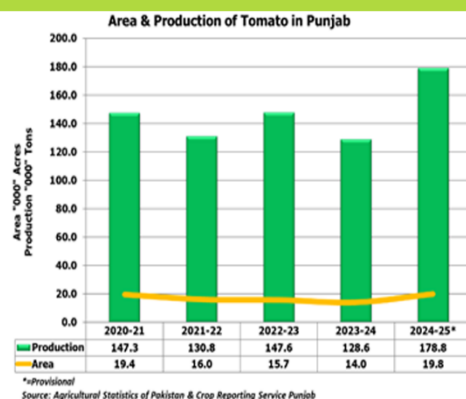


*=Export during July 2024 to May 2025
Source: PBS & Pakistan Single Window



PROVINCIAL OVERVIEW

- A comprehensive analysis of tomato cultivation in Punjab highlights that both production and the cultivated area have experienced instability over the years.
- During the year 2024–25, with estimated production has been recorded at 178,800 tons, which is 39% higher over the last year. Likewise, area under cultivation has also been increased up to 19,800 acres, which is 41.4% higher in contrast with last year.
- The main tomato-producing districts in Punjab include Sheikhupura, Kasur, Khushab, Rahim Yar Khan, Multan, Muzaffargarh and Bahawalpur.
- Among them, Sheikhupura leads with the highest production at 24,719 tons, followed by Kasur with 21,118 tons and Khushab with 13,988 tons.



- Due to seasonal variations, the potato production cycle differs across provinces in Pakistan. The key potato-producing districts of all provinces along with their corresponding production seasons, are detailed below:

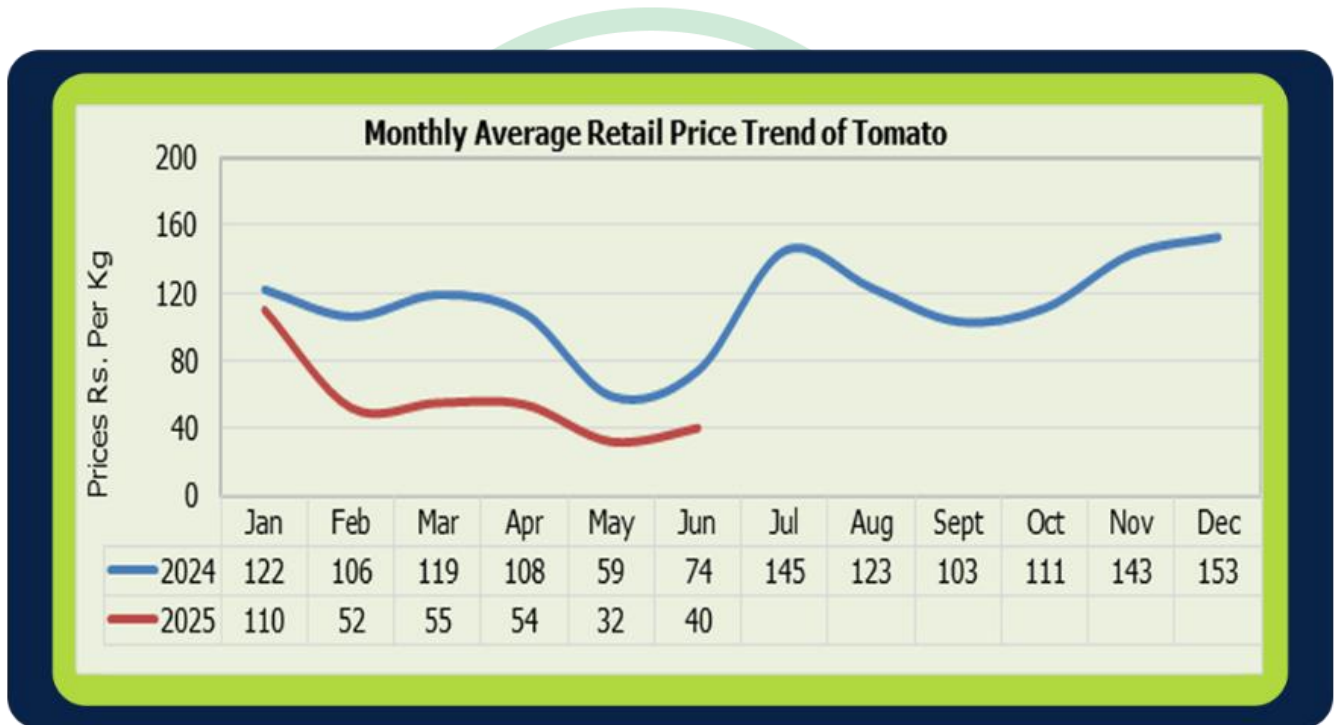
Province	Top Production Districts	Availability of Tomato Crop in Markets
Punjab	Sheikhupura, Kasur, Khushab, Rahim Yar Khan, Multan, Muzaffargarh, Bahawalpur etc.	April – June
Sindh	Thatta, Badin, Mirpurkhas, Matiari & T.M.Khan etc.	December – April
KP	Swat, Malakand, Kurram, Muhmand & Charsada etc.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



Price Control & Commodities Management Department



- Local production season of tomato is close to end thus local supply is declining. However, production season in KP and Balochistan has been commenced, from where supply is increasing, therefore tomato prices are yet in normal range. Monthly average retail price of tomato in Punjab is Rs.40 per Kg during June which is comparatively less than last year.



Supply Management Advisory

Assessment

- Production season of tomato in Punjab is about to end leading to decline in local supply. However, due to start of production season in KP and Balochistan, supply & price situation of tomato is stable in local markets.



Forecast

- Local production season has reached to end, now supplies will be available from KP and Balochistan which will incur additional cost of transportation. Moreover, tomato imports from Afghanistan & Iran will also commence during July to fulfill consumption needs. Stress supply period of tomato will prevail from July to November (5 months), till then tomato prices are likely to exhibit increasing trend due to higher transportation cost from other provinces as well as import cost.



Advisory

- The District Administration, with the help of concerned DO (PAMRA) / Secretaries Market Committee, should maintain close coordination with commission agents to ensure adequate and steady supply of tomato from KP & Balochistan with the help of their counterparts based in these provinces.
- To prevent over-profiteering, effective price control mechanisms must be enforced by the District Administration.
- Transparent price determination should be ensured through strict monitoring of the auction process, with active involvement of Market Committees.
- Price Control Magistrates should increase their inspections in a bid to ensure implementation of retail notified rates.



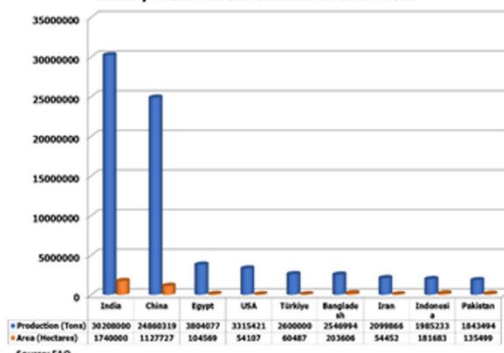
Onion



Global Overview

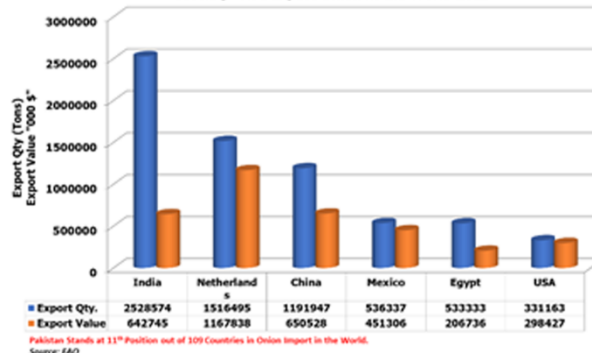
- According to FAO data, the top onion-producing nations globally include India, China, Egypt, the United States, Türkiye, Bangladesh, Iran, Indonesia, and Pakistan.
- In year 2023, India retained its status as the world's largest onion producer with a remarkable output of 30.2 million tons, whereas Pakistan stood at ninth place, producing 1.843 million tons.

Country Wise Area & Production of Onion 2023

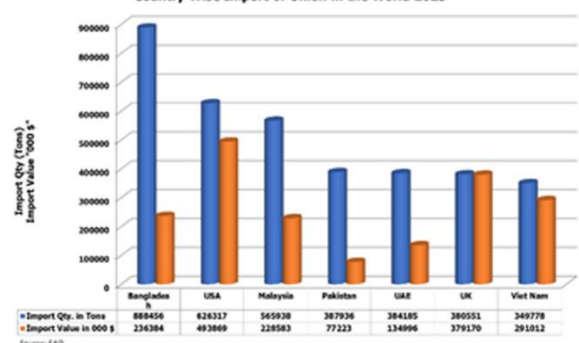


- Due to its production dominance, India also led global onion exports during year 2023, exporting 2.52 million tons and generating USD 642.74 million in revenue.
- The Netherlands followed as the second-largest exporter, with a shipment volume of 1.516 million tons valued at USD 1,167.8 million.
- Pakistan ranked 11th among onion-exporting countries, exporting 197,889 tons worth USD 69.14 million.
- Major onion-importing countries include Bangladesh, the United States, Malaysia, Pakistan, the United Arab Emirates, the United Kingdom, and Vietnam, among others.
- As per FAO data, Bangladesh ranked as the world's largest onion importer in year 2023, bringing in 888,456 tons at a cost of USD 236.3 million.
- Pakistan stood as the fourth-largest importer, sourcing 387,936 tons of onions at an expenditure of USD 77.22 million.

Country Wise Export Onion in the World 2023



Country Wise Import of Onion in the World 2023



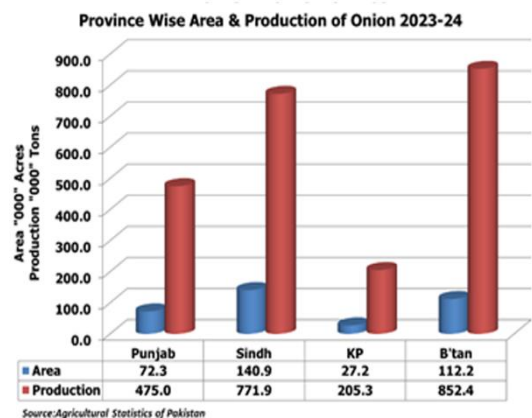
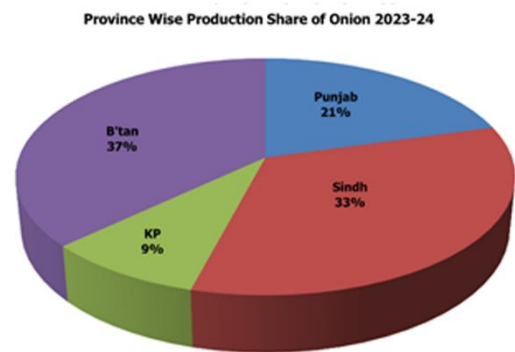
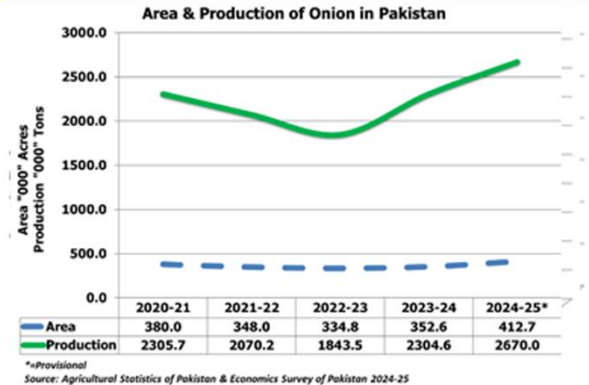


National Overview

- Over the past five years, onion production and the area under cultivation in Pakistan have shown noticeable fluctuations.
- In the fiscal year 2024–25, estimated domestic onion production rose to 2.670 million tons, representing a 15.8% increase over the previous year and 25.39% rise compared to the year 2020-21.

- The cultivated area expanded to 4,12,700 acres during the same period—reflecting a 17.04% year-on-year increase 8.6% decrease in contrast with area during year 2020-21.
- Balochistan stands as the leading contributor to Pakistan's onion production, accounting for 37% of the total national production, followed by Sindh with a 33% share.
- Punjab ranks third, producing 21% of the total, while Khyber Pakhtunkhwa (KP) contributes the smallest portion, with just 9% of the country's overall onion yield.

- In year 2023–24, Balochistan produced 852,400 tons of onions from a cultivated area of 1,12,200 acres.
- Sindh followed with a harvest of 771,900 tons across 1,40,900 acres.
- Punjab contributed 474,600 tons, cultivated over 72,300 acres.
- Khyber Pakhtunkhwa (KP) recorded an output of 205,300 tons from 27,200 acres under cultivation.



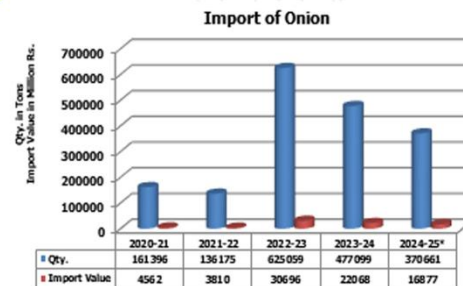


Price Control & Commodities Management Department

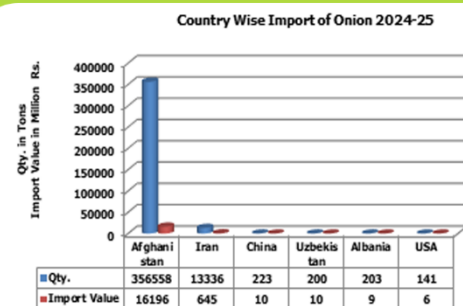


- Due to insufficient domestic production, Pakistan depends on onion imports to meet its consumption needs.
- In the fiscal year 2023–24, the country imported 477,099 tons of onions at a cost of Rs. 22,068 million.
- Between July and May of 2024–25, onion imports stood at 370,661 tons, resulting in an expenditure of Rs. 16,877 million.
- Pakistan primarily sources onions from Afghanistan, Iran, China, Uzbekistan, Albania, and the United States.
- Among these, imports from Afghanistan and Iran constitute the bulk of the volume, while contributions from other countries remain relatively minimal.

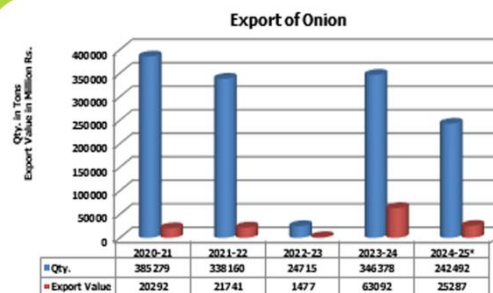
- During the year 2024-25 (July to May), Pakistan imported 3,56,558 tons of onion from Afghanistan at a cost of Rs. 16,196 million.
- Moreover, 13,336 tons have been imported from Iran, incurring expense of Rs. 645 million.
- To bolster its foreign exchange earnings, Pakistan engages in onion exports to various international markets.
- In the fiscal year 2023–24, the country exported 346,378 tons of onions, generating Rs. 63,092 million in revenue.
- During year 2024-25 (July to May), onion exports reached 242,292 tons, yielding Rs. 25,287 million.
- Major export destinations include Malaysia, Sri Lanka, the United Arab Emirates (UAE), Qatar, Bangladesh, Singapore and Oman.
- Export volumes to Malaysia, Sri Lanka, and the UAE are particularly substantial, underscoring strong demand for Pakistani onions in these high-priority markets.
- During the 2024-25 period (July to May), Pakistan exported 89,664 tons of onion to Malaysia, generating revenue of Rs. 9,369 million.
- Similarly, 63,340 tons have been exported to Sri Lanka, while 44,769 tons have been dispatched to the UAE.



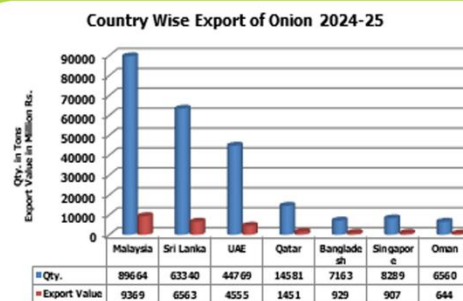
*Import during July 2024 to May 2025
Source: PBS & Pakistan Single Window



*Import during July 2024 to May 2025
Source: PBS & Pakistan Single Window



*Export during July 2024 to May 2025
Source: PBS & Pakistan Single Window

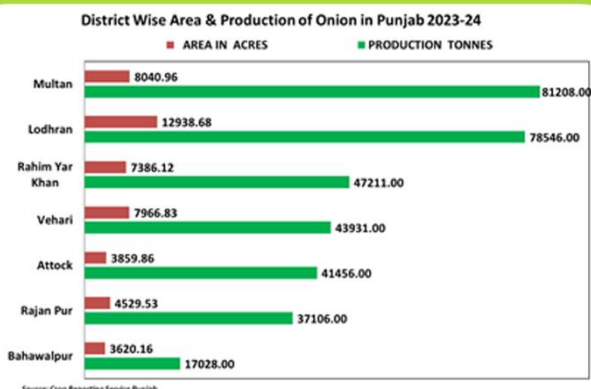
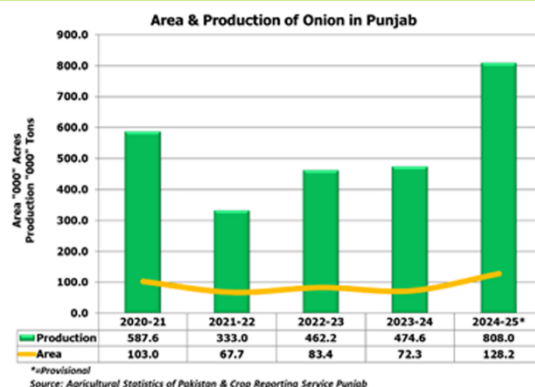


*Export during July 2024 to May 2025
Source: PBS & Pakistan Single Window



PROVINCIAL OVERVIEW

- Onion cultivation and production in Punjab have shown instability over past five years.
- During year 2024–25, estimated onion production in Punjab has been recorded at 808,000 tons, reflecting a 70.24% increase from the previous year and 37.52% rise compared to the last five year.
- Similarly, the cultivated area of onion has been recorded at 1,28,200 acres, marking a 77.3% drop from the previous year and a significant 24.46% decrease relative to 2020–21.
- Major onion-producing districts in Punjab include Multan, Lodhran, Rahim Yar Khan, Vehari, Attock, Rajanpur, and Bahawalpur.
- Among these, Multan ranked as the top producer, yielding 81,208 tons from 8040 acres, followed by Lodhran with 78,546 tons harvested from 12,939 acres.



- Onion supply fluctuates across provinces throughout the year due to seasonal variations. The major onion-producing districts in all provinces, along with their respective production seasons, are detailed below

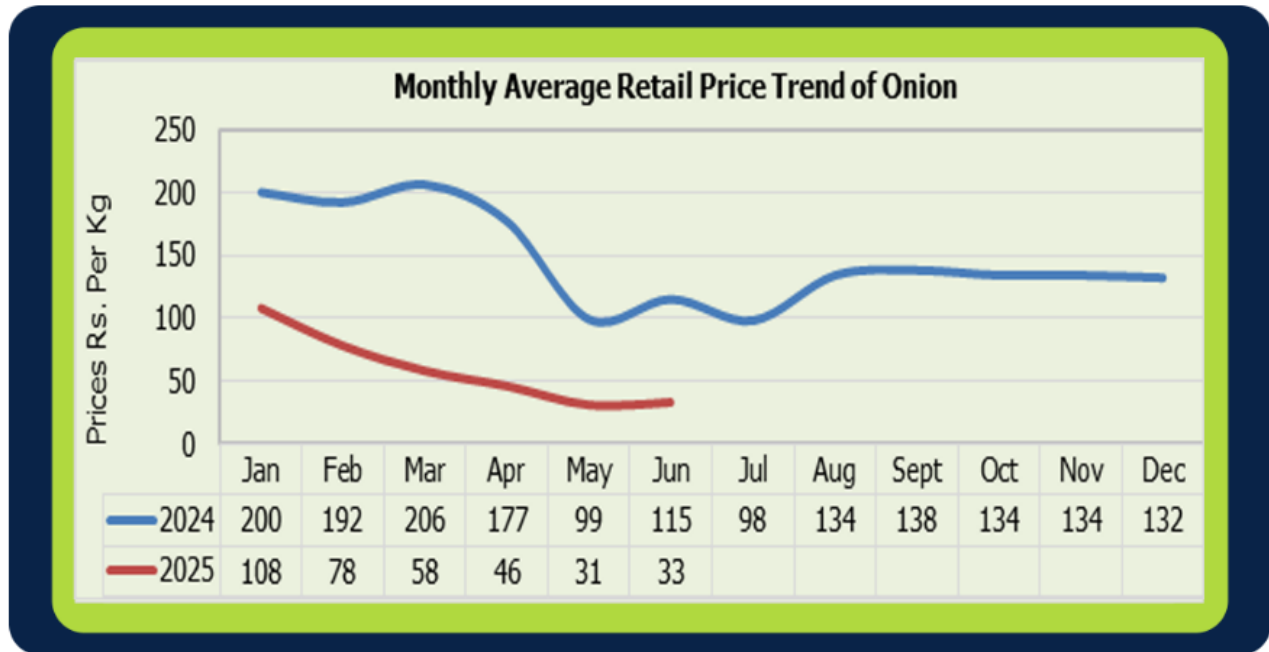
Province	Top Production Districts	Availability of Onion Crop in Markets
Punjab	Multan, Lodhran, Rahim Yar Khan, Vehari, Attock, Rajan Pur & Bahawalpur etc.	March to July
Sindh	Mirpurkhas, Sanghar, Jacobabad, Matiari, Shaheed Benazir Abad & N. Feroze etc.	November – April
KP	Swat, Dir Lower, Malakand, Dir Upper, Muhmand, Bajour & Khyber etc.	June – September
Balochistan	Khuzdar, Nasirabad, Washuk, Kharan, Harani, Jaffarabad & Lasbela etc.	June - November



Price Control & Commodities Management Department



- Production season of onion in Punjab is approaching to end. Now, Production season in Balochistan & KP are in progress, from where supply is gradually increasing, resultantly supply & price situation of onion is stable in local markets. The graphical trend of monthly average retail price of onion in Punjab is given as under:



Supply Management Advisory

Assessment

- Production season of onion in Punjab is getting close to end due to which local supply has started to decrease. However, onion production season in Balochistan and Khyber Pakhtunkhwa has been started from where supply is gradually increasing. The start of production season in Balochistan & Khyber Pakhtunkhwa has stabilized supply situation and resultantly onion price is depicting stable trend in local markets.



Forecast

- The local onion production season is expected to remain steady until July. However, post mid-July, the local supply is anticipated to decline and main supply of onion will be available from Balochistan and Khyber Pakhtunkhwa. Import from Afghanistan may also be started during August to satisfy the consumption requirement. As a result, onion prices are likely to experience slightly increasing trend from mid-July onward due to addition of high transportation cost from other provinces.



Advisory

- The District Administration, with the help of concerned DO (PAMRA) / Secretaries Market Committees, should actively persuade commission agents to ensure the uninterrupted supply of onion from Balochistan and Khyber Pakhtunkhwa, with the help of their counterparts based in those provinces.
- Strict monitoring of the auction process must be enforced by Market Committees to guarantee transparency and fairness in price determination mechanism.
- Comprehensive price control measures in the districts should be rigorously applied to prevent over-profiteering and maintain onion prices within reasonable and affordable limits.



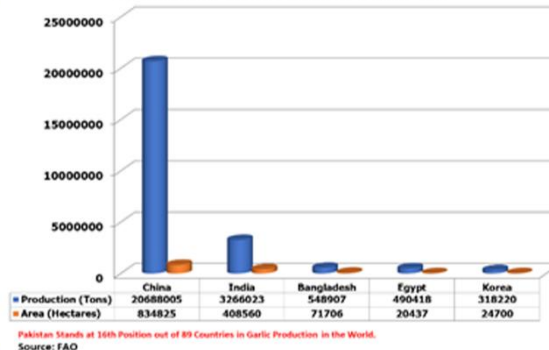
Garlic



Global Overview

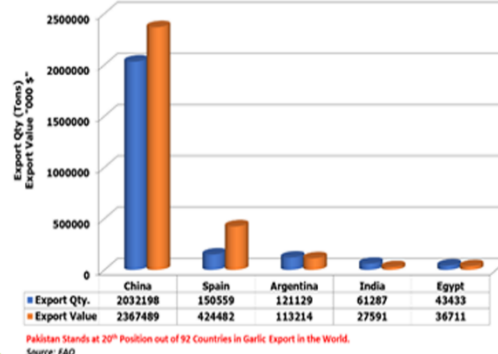
- According to FAO data, the leading garlic-producing countries include China, India, Bangladesh, Egypt, and South Korea.
- During year 2023, China retained its position as the world's top garlic producer, harvesting an impressive 20.68 million tons across 834,825 hectares.
- India ranked second, with a production volume of 3.26 million tons, harvested from 408,560 hectares.
- Bangladesh, Egypt and South Korea followed as other key producers.
- Pakistan held the 16th position globally, with a garlic output of 115,390 tons.

Country Wise Area & Production of Garlic 2023

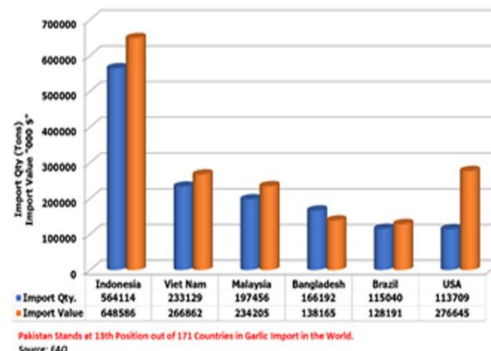


- Alongside its dominant production, China also topped global garlic exports in year 2023, shipping 2.03 million tons valued at USD 2,367 million.
- Spain claimed the second position among major garlic exporters, exporting 150,559 tons worth USD 424.4 million.
- Pakistan ranked 20th out of 92 garlic-exporting countries, with an export volume of 3,460 tons generating USD 2.25 million in export revenue.
- The principal garlic-importing countries include Indonesia, Vietnam, Malaysia, Bangladesh, Brazil, the United States and several others.
- During year 2023, Indonesia emerged as the largest garlic importer, bringing in 564,114 tons valued at USD 648.5 million.
- Pakistan ranked 13th among garlic-importing nations, importing 37,962 tons at an expenditure of USD 32.5 million.

Country Wise Export Garlic in the World 2023

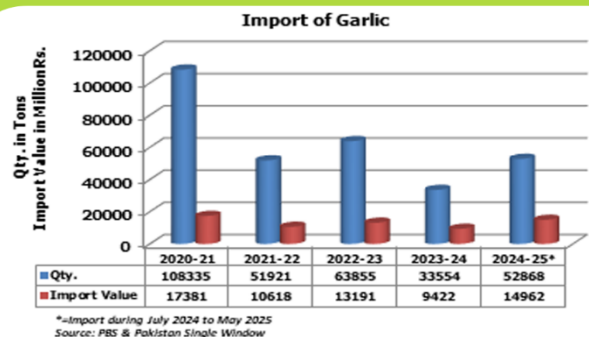
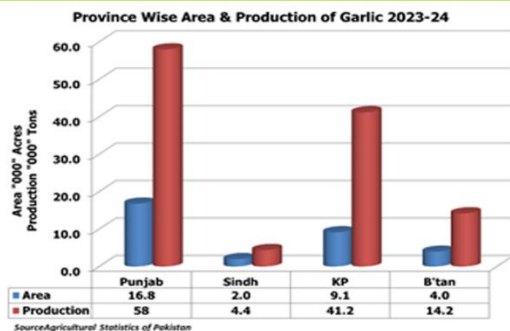
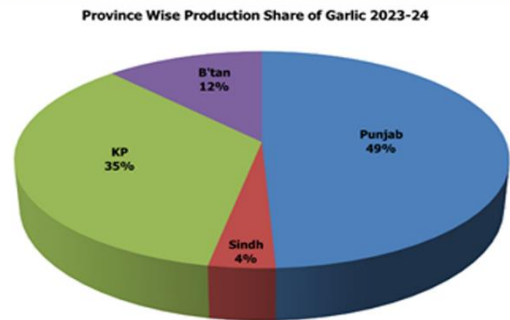
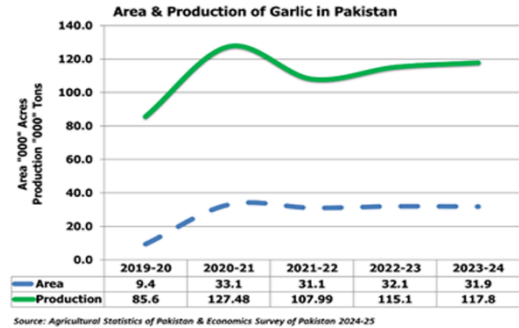


Country Wise Import of Garlic in the World 2023



National Overview

- Pakistan's domestic garlic production has been increasing over last two years, whereas the area under cultivation has remained relatively stable.
- During the year 2023–24, national garlic production rose to 117,900 tons—reflecting a 2.16% increase over the previous year and a notable 37.7% growth compared to production levels recorded during year 2019-20.
- The area under garlic cultivation was recorded at 31,900 acres during year 2023-24, showing year-on-year stability and a substantial 38.2% increase in contrast with area recorded during year 2019-20.
- Punjab leads national garlic production with a dominant 49% share, followed by Khyber Pakhtunkhwa at 35%, Balochistan at 12% and Sindh contributing the remaining 4%.
- In the fiscal year 2023–24, Punjab achieved a garlic production of 58,000 tons cultivated over 16,800 acres, while Khyber Pakhtunkhwa produced 41,200 tons from 9,100 acres.
- In Balochistan, garlic output reached 14,200 tons from 4000 acres, whereas Sindh recorded the lowest production at 4,400 tons harvested from 2000 acres.
- To meet domestic consumption needs, Pakistan continues to rely on garlic imports from countries such as China, Afghanistan and Iran.



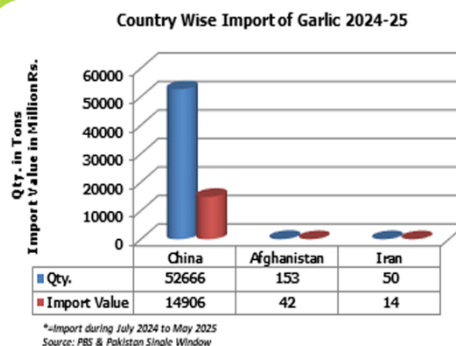


Price Control & Commodities Management Department

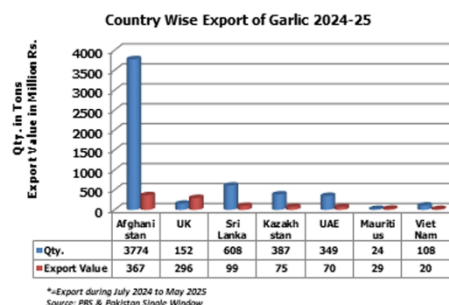
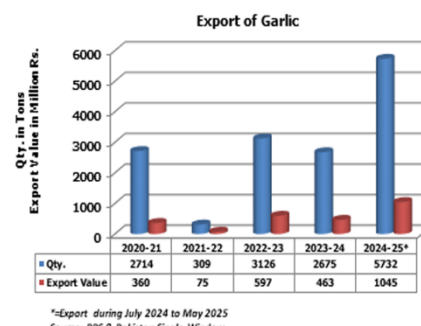


- During the year 2023–24, Pakistan imported 33,554 tons of garlic at a cost of Rs. 9,422 million. However, during the July to May period of year 2024–25, garlic imports rose sharply to 52,868 tons, driving the import expenditure up to Rs. 14,962 million.

- Pakistan mainly imports garlic from China, Afghanistan, and Iran, with China supplying the vast majority, while imports from Afghanistan and Iran remain relatively limited.
- During the year 2024–25 (July to May), Pakistan imported a significant volume of garlic primarily from China, totaling 52,666 tons at a cost of Rs. 14,906 million. In comparison, imports from Afghanistan and Iran were minimal—recorded at just 153 tons and 50 tons, respectively.



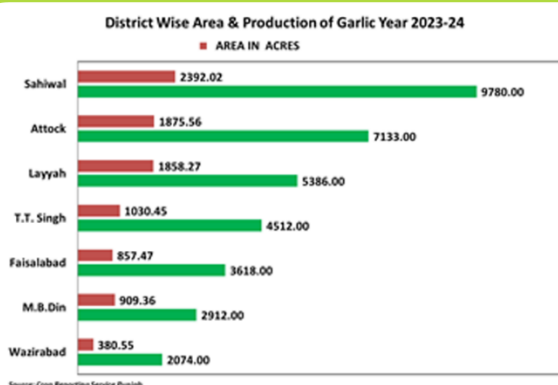
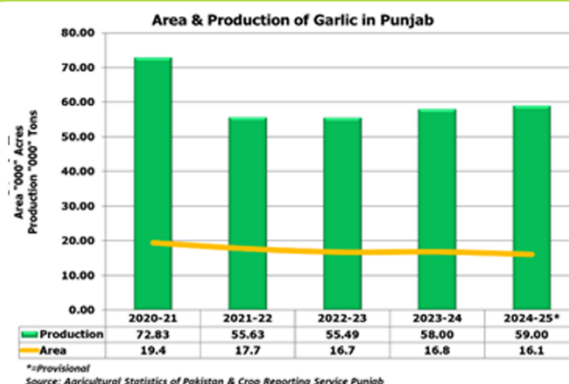
- While Pakistan relies on garlic imports to satisfy domestic consumption, it simultaneously engages in garlic exports, supporting the country's foreign exchange reserves.
- During the year 2023–24, Pakistan exported 2,675 tons of garlic, earning Rs. 463 million. During the July to May period of 2024–25, exports increased significantly to 5,732 tons, contributing Rs. 1,045 million to foreign exchange earnings.
- Key export destinations for Pakistani garlic include Afghanistan, the United Kingdom, Kazakhstan, the United Arab Emirates, Mauritius, Saudi Arabia, and Sri Lanka.
- The majority of Pakistan's garlic exports are directed to Afghanistan, which constitutes the largest share of the total export volume, while exports to other countries remain relatively modest.
- During the July to May period of 2024–25, Pakistan exported 3,774 tons of garlic to Afghanistan, generating Rs. 367 million. In comparison, exports to the UK, Sri Lanka, Kazakhstan and the UAE were recorded at 152





PROVINCIAL OVERVIEW

- Garlic cultivation and production in Punjab have demonstrated overall stability over the past three years, with only slight variations observed.
- During year 2024–25, estimated production of garlic in Punjab has been recorded at 59,000 tons—marking a 1.72% increase from the previous year and a remarkable 81.98% rise in contrast with year 2020-21. Similarly, the cultivated area has been recorded at 16,100 acres showing 4.16% increase year-on-year, while showing a 17.1% increase compared to year 2020-21.
- Key garlic-producing districts in Punjab are Sahiwal, Attock, Layyah, T.T. Singh, Faisalabad, M.B. Din and Wazirabad among others.
- Sahiwal attained status of highest producing district of garlic producing 9,780 tons from a cultivated area of 2,392 acres.



- Local supply of garlic is in progress. Province wise major producing districts of garlic along with production season are outlined as under:

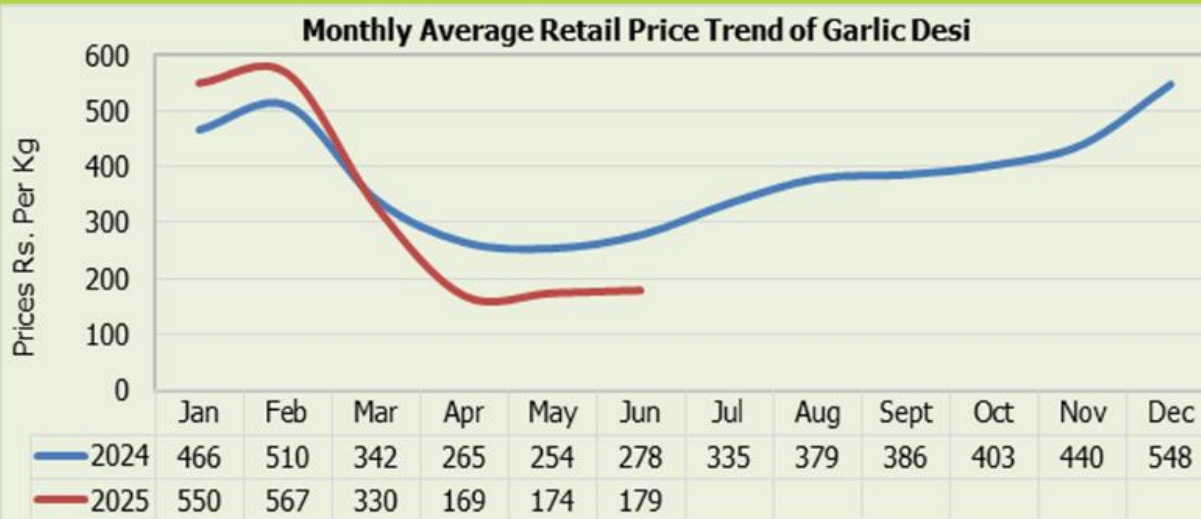
Province	Top Production Districts	Availability of Garlic Crop in Markets
Punjab	Sahiwal, Attock, Layyah, T.T. Singh, Faisalabad, M.B. Din & Wazirabad	March-May
Sindh	Thatta, T.M. Khan, Matiari, Sanghar, Larkana & Tando Allahyar	March-April
KP	Swabi, Nowshera, Kohat, Mardan, Peshawar & Swat	May-June
Balochistan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



Price Control & Commodities Management Department



- Local prices of garlic have significantly decreased due to availability of local crop. Monthly average retail price of garlic in Punjab is Rs.179/Kg during June.



Supply Management Advisory

Assessment

- Local garlic production has been recorded at 59,000 tons during year 2024-25, reflecting a 1.72% increase over last year's output of 58,000 tons. The availability of the local crop has contributed to a stable supply and price trend in local markets. Import from China is also in progress to cater for consumption requirement.



Forecast

- Production season of garlic has turned off in Punjab, however local supply is available in the markets. Moreover, supply of garlic from KP and Balochistan is also available along with some import from China. Price and supply situation of garlic is expected to remain stable till September-2025, afterwards supply will be more dependent on import from China, which may lead to increase in price of garlic in local markets.



Advisory

- The District Administration, with the help of concerned DO (PAMRA) / Secretaries Market Committee, should persuade local commission agents to ensure sufficient garlic supply from Punjab, KP and Balochistan in addition to smooth import from China to fulfil consumption requirements.
- Price Control Magistrates must actively monitor markets to prevent over-profiteering and ensure fair pricing.
- Promoting the processing of garlic into paste may ensure smooth supply of garlic especially during the off-production season.



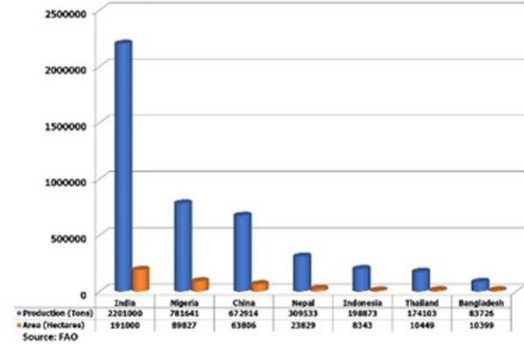
Ginger



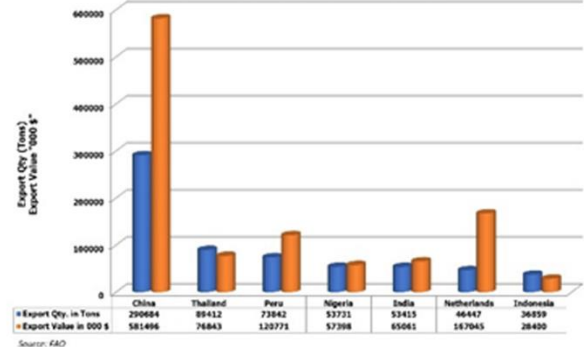
Global Overview

- FAO data states that India, Nigeria, China, Nepal, Indonesia, Thailand and Bangladesh, etc are major producing countries of ginger across the world.
- Globally, India emerged as the largest producer of ginger in 2023, harvesting 2.2 million tons from 191,000 hectares. Nigeria followed with a production of 781,641 tons cultivated over 89,827 hectares, while China secured the third position, producing 672,914 tons.
- From an export standpoint, however, China dominated the global ginger trade. It was followed by Thailand, Peru, Nigeria, India, the Netherlands, and Indonesia among other key players.
- During year 2023, China led ginger exports with a shipment volume of 290,684 tons, generating export earnings of USD 581.5 million. Thailand ranked second, exporting 89,412 tons during the same year.

Country Wise Area & Production of Ginger 2023

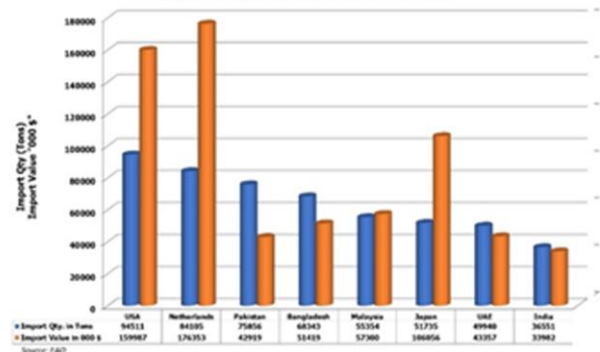


Country Wise Export Ginger in the World 2023



- The major ginger-importing countries include the United States, the Netherlands, Pakistan, Bangladesh, Malaysia, Japan, the UAE and India among others.
- The United States topped the list of global ginger importers, importing 94,511 tons valued at USD 160 million. The Netherlands followed closely with 84,105 tons. Pakistan ranked third, importing 75,856 tons of ginger at a total cost of USD 42.919 million.

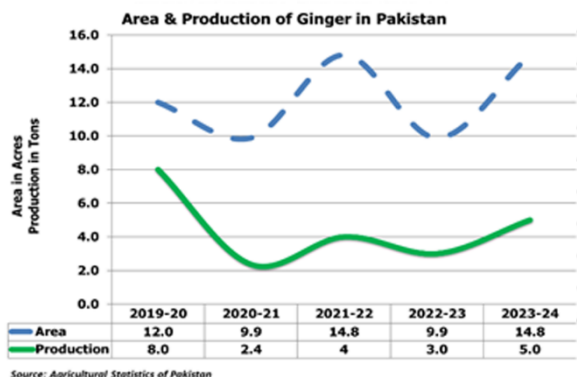
Country Wise Import of Ginger in the World 2023



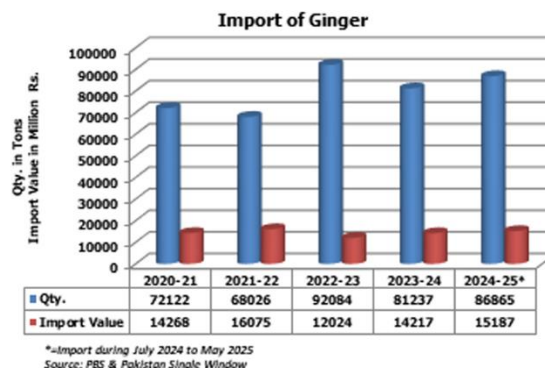


National Overview

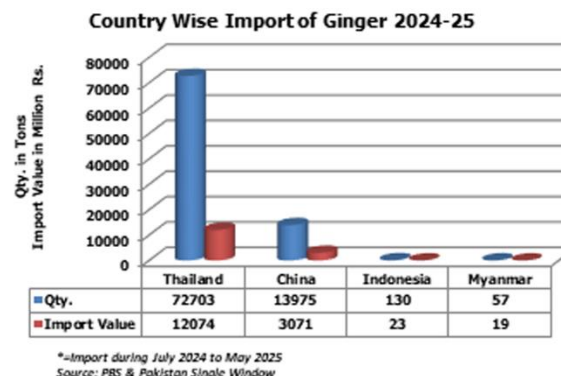
- Pakistan's domestic ginger production remains negligible, making the country heavily dependent on imports to satisfy local consumption needs.
- Domestic production of ginger stood at a mere 5 tons during year 2023-24, grown on just 14,800 acres of land. In sharp contrast, national consumption demand reached 81,231 tons—underscoring a significant shortfall and highlighting Pakistan's near-total reliance on imports to meet consumption needs.



- In the fiscal year 2023–24, Pakistan imported 81,237 tons of ginger at a total cost of Rs. 14,217 million. During the year 2024-25 (July to May), imports increased to 86,865 tons, with an associated expenditure of Rs. 15,187 million.
- Pakistan mainly imports its ginger imports from Thailand, China, Indonesia and Myanmar.



- A significant portion of these imports comes from Thailand and China, while contributions from Indonesia and Myanmar remain comparatively minor. During July to May of year 2024–25, Pakistan imported 72,703 tons of ginger from Thailand, costing Rs. 12,074 million. An additional 13,975 tons were procured from China, amounting to Rs. 3,071 million in import expenses.



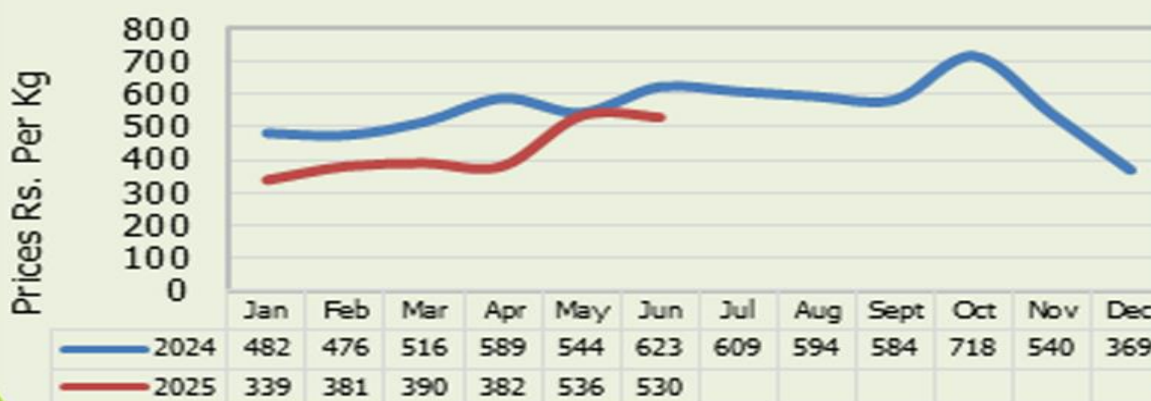


Price Control & Commodities Management Department

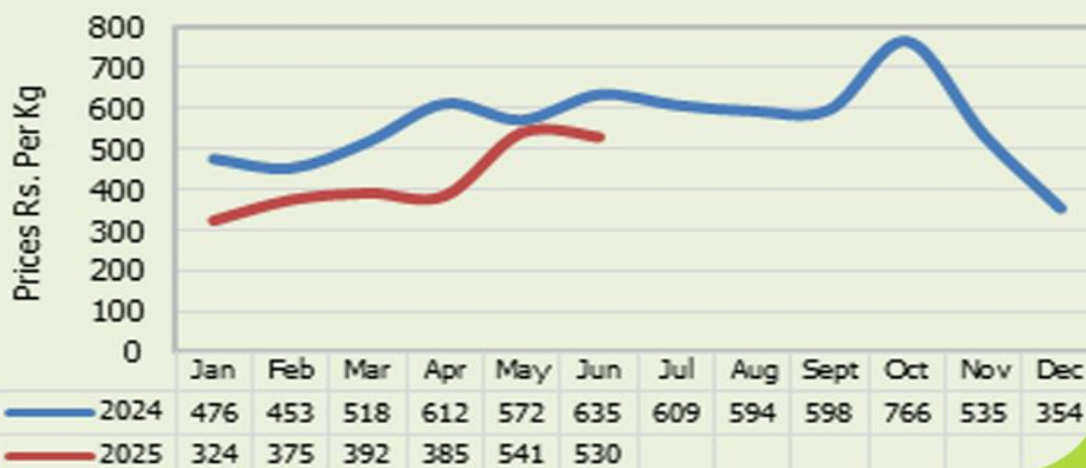


- The supply of ginger in Pakistan always remains reliant on imports, primarily from Thailand and China. Monthly average retail price of Thai ginger in June is recorded at Rs. 530 per kg, while of Chinese ginger is recorded at Rs. 530 per kg. Ginger prices are exhibiting slightly decreasing trend in local markets.

Monthly Average Retail Price Trend of Ginger China



Monthly Average Retail Price Trend of Ginger Thailand





Supply Management Advisory

Assessment

- In case of Ginger, Pakistan entirely depends on import with no local production. Major import is commonly arranged from Thailand and China. During this year (July-May), ginger import has been recorded at 86,865 tons. Due to smooth import, local prices of ginger are depicting slightly decreasing trend.



Forecast

- Supply & price situation of ginger is entirely dependent on import situation from Thailand & China. Due to slack season in those countries, import is likely to decline and resultantly local prices are expected to increase in future. However, in China production season of ginger will begin during October-2025 and in Thailand production season will commence during November-2025, afterwards prices are expected to decline



Advisory

- The District Administration with DO (PAMRA) / Secretaries Market Committee should actively engage with local importers and commission agents to ensure a steady import of ginger to ensure stable supply & price situation of ginger in local markets.
- Processing of ginger into paste may mitigate supply shocks and curb price volatility in local markets.
- Agriculture Department should introduce such seed varieties which are more feasible to local climate to ensure sufficient domestic production and reduce dependency on import.



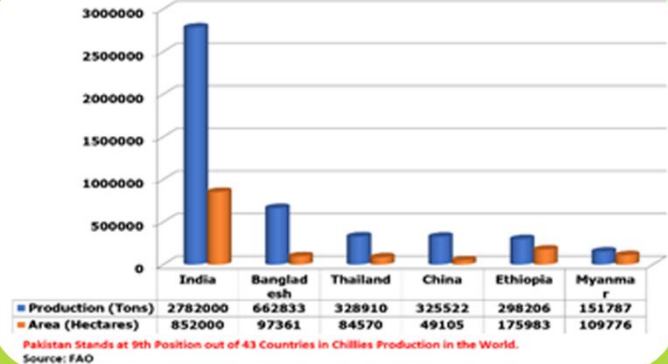
Chillies



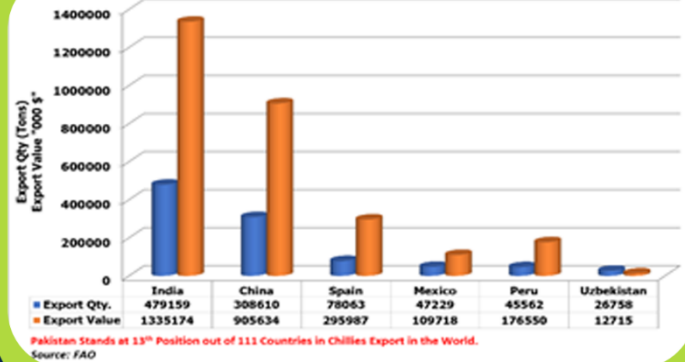
Global Overview

- According to FAO data, chillies are cultivated in 43 countries across the globe.
- The top chili-producing nations include India, Bangladesh, Thailand, China, Ethiopia, Myanmar, among others.
- Pakistan holds the 9th position among global chili producers, with an annual output of 109,615 tons.
- The leading chili-exporting countries globally include India, China, Spain, Mexico, Peru, Uzbekistan, and several others.
- During year 2023, India emerged as the largest chili exporter, shipping 479,159 tons, while China ranked second with an export volume of 308,610 tons.
- Pakistan was positioned 13th among the world's chili-exporting nations.
- Key chili-importing nations include the United States, China, Thailand, Spain, Bangladesh, Mexico, and others.
- In the global chili trade, the United States ranked as the largest importer in 2023, purchasing 191,292 tons at a total cost of USD 562.8 million.
- Pakistan stood at 39th position among chili-importing countries, with imports totaling 2,832 tons at an expenditure of USD 3.76 million.

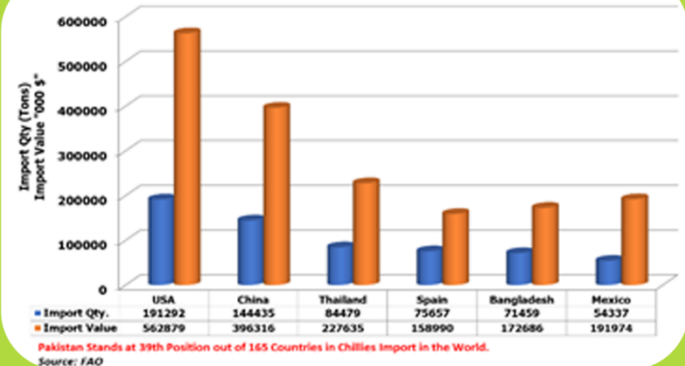
Country Wise Area & Production of Chillies 2023



Country Wise Export Chillies in the World 2023



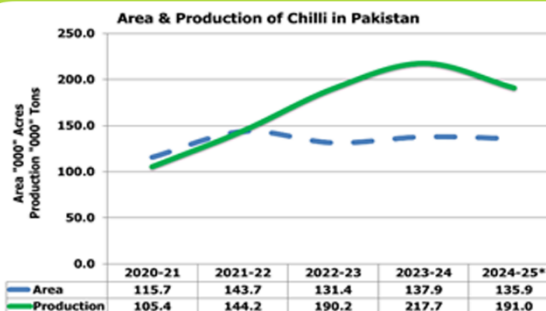
Country Wise Import of Chillies in the World 2023





National Overview

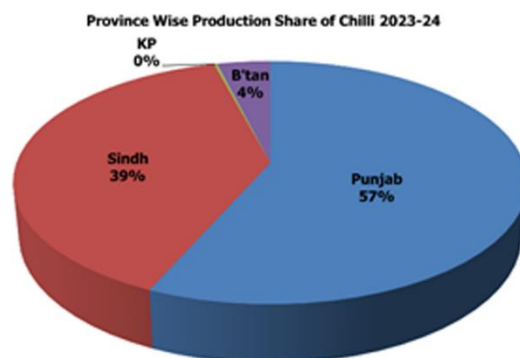
- In Pakistan, the area under cultivation and production of chilies has shown considerable volatility over the past five years. During 2024–25, chili production reached 1,91,000 tons—reflecting a 12.26% decrease compared to the previous year and 81.2% rise as compared to year 2020–21.



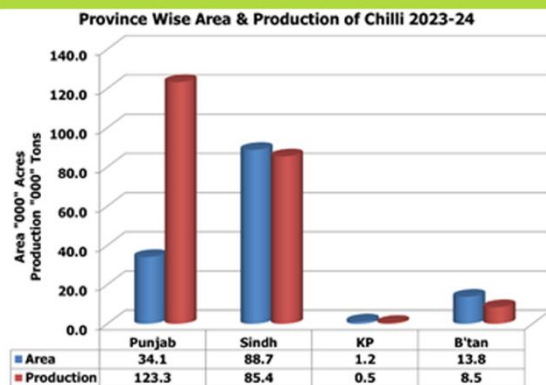
*Provisional
Source: Agricultural Statistics of Pakistan & Economics Survey of Pakistan 2024-25

- The area cultivated for chilies stood at 1,35,900 acres, showing a 1.45% year-on-year decrease. However, this marks an 17.50% higher when compared to the cultivated area in 2020–21.

- Provincially, Punjab dominates the country's chili production, contributing 57% of the total output. Sindh ranks second with a 39% share, followed by Balochistan at 4%. Khyber Pakhtunkhwa (KP) plays only a minimal in chili production.



- Punjab emerged as the leading province in chili production during 2023–24, harvesting 1,23,300 tons from a cultivated area of 34,100 acres. Sindh followed with a production of 85,400 tons across 88,700 acres.
- In contrast, chili production in Balochistan and Khyber Pakhtunkhwa (KP) remained minimal, amounting to just 8,500 tons and 500 tons, respectively.



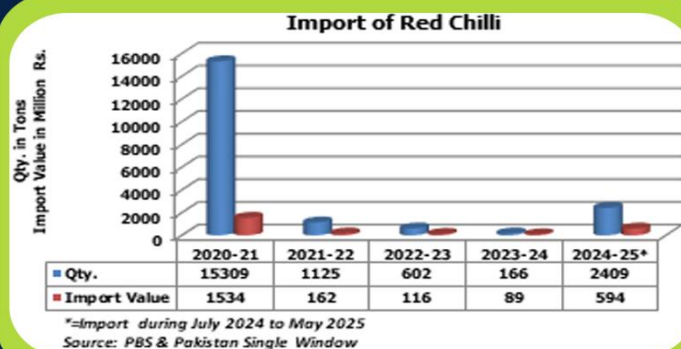
Source: Agricultural Statistics of Pakistan



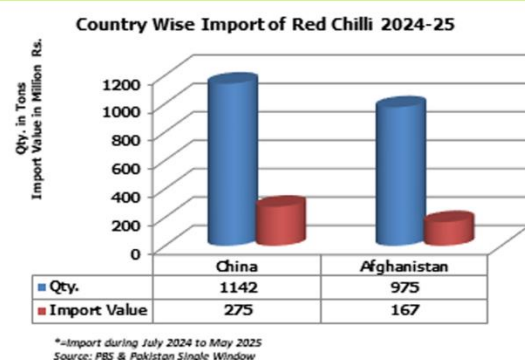
Price Control & Commodities Management Department



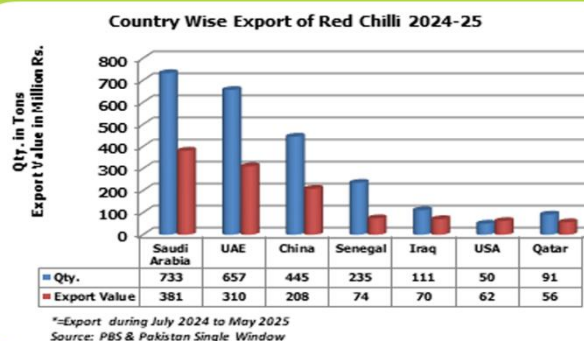
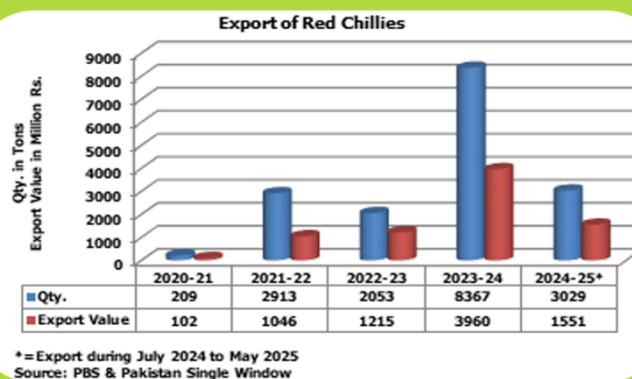
- During year 2023–24, Pakistan imported 166 tons of chilies at a cost of Rs. 89 million. However, during the July to May period of year 2024–25, chili imports surged to 2,409 tons, with an associated expenditure of Rs. 594 million—reflecting a significant year-on-year increase in both volume and value.



- Pakistan primarily sources red chilies from Afghanistan and China. During the 2024–25 period (July to May), imports from China totaled 1,142 tons, costing Rs. 275 million, while 975 tons were imported from Afghanistan at an expense of Rs. 167 million.
- Pakistan's red chili exports significantly exceed its imports in both volume and value. In the fiscal year 2023–24, the country exported 8,367 tons of red chilies, generating Rs. 3,960 million in export revenue.



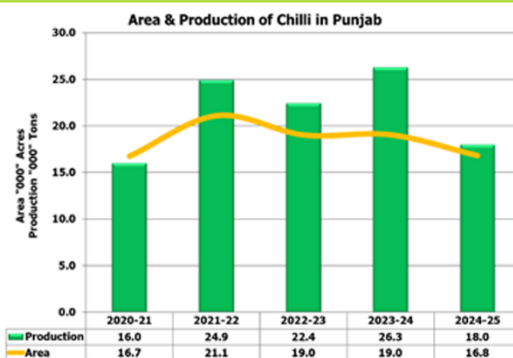
- During the year 2024-25 (July to May), exports reached 3,029 tons, earning Rs. 1,551 million.
- Key export destinations for Pakistani red chilies include Saudi Arabia, the United Arab Emirates, China, Senegal, Iraq, the United States and Qatar.



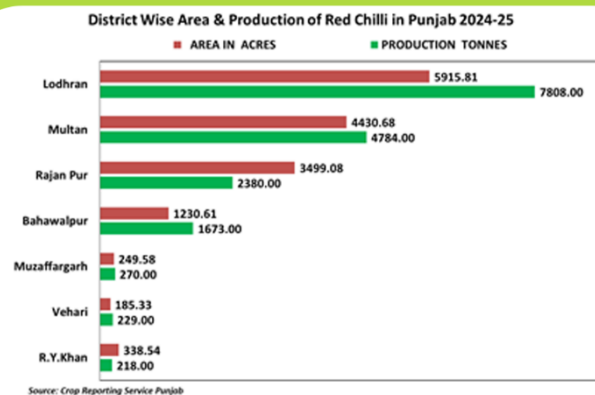


Provincial Overview

- In Punjab, chili cultivation and production have remained uncertain with fluctuations over the past five years.
- During year 2024–25, chili production in the province declined sharply to 18,000 tons, representing a 31.48% drop compared to the previous year. However, when compared with year 2020–21, this figure reflects a 12.5% increase, indicating inconsistent production trends in recent years.



- The cultivated area for chilies during year 2024–25 stood at 16,800 acres, showing 11.75% reduction from the previous year.
- Major chili-producing districts in Punjab include Lodhran, Multan, Rajanpur, Bahawalpur, Muzaffargarh, Vehari, and Rahim Yar Khan.
- Among these, Lodhran led with the highest production, yielding 7,808 tons from 5916 acres. Multan followed with 4,784 tons, while Rajanpur ranked third, producing 2,380 tons.





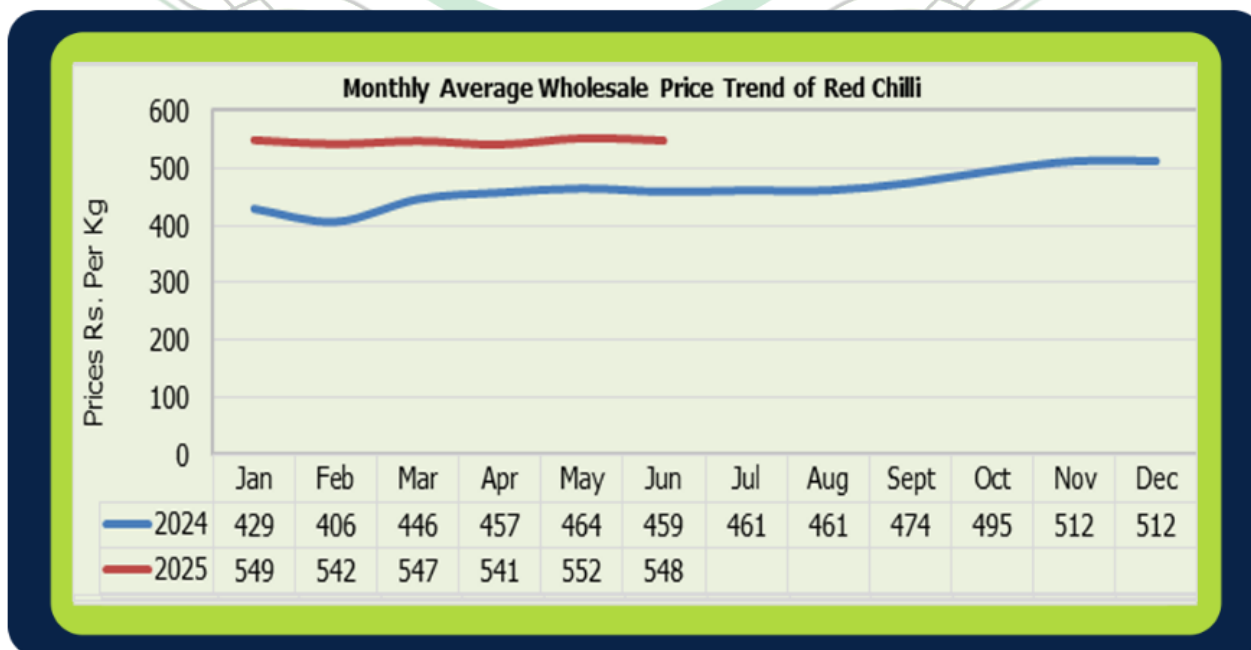
Price Control & Commodities Management Department



- The main crop of chilies in Punjab will be available during July and from Sindh will be available during August. The major chili-producing districts in each province, along with their respective production seasons, are outlined below:

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

- Price of red chilies are showing increasing trend due to off production season in Sindh & Punjab. Monthly average retail price of red chili in Punjab is recorded at Rs. 548 per kilogram during June. The graphical trend of monthly average retail prices of red chilies in Punjab is illustrated below:



Supply Management Advisory

Assessment

- Currently, slack production season of chilies is prevailing in Punjab & Sindh. In Punjab, production season will start during July and in Sindh will begin during August. Sindh has major share of 71%, Punjab 22% and Balochistan only 7% in domestic production of chili. As currently local production season is off, therefore prices are showing increasing trend in local markets.



Forecast

- The local chili harvest in Punjab is expected to begin in July, followed by Sindh's crop in August. With the onset of the production season in both provinces, chili prices are anticipated to stabilize and return to a normal range.

Advisory

- The District Administration, with the help of relevant DO (PAMRA) / Secretaries Market Committee, should engage closely with local commission agents and traders to maintain a consistent chili supply from Sindh at reasonable prices.
- Furthermore, encouraging kitchen gardening practices can play a meaningful role in enhancing local production to help meet domestic chili consumption requirements.
- Agriculture Department should introduce such seed varieties which are high yielding, climate resistant and also able to grow in off season, so that local production may be sufficient enough to meet consumption requirement.



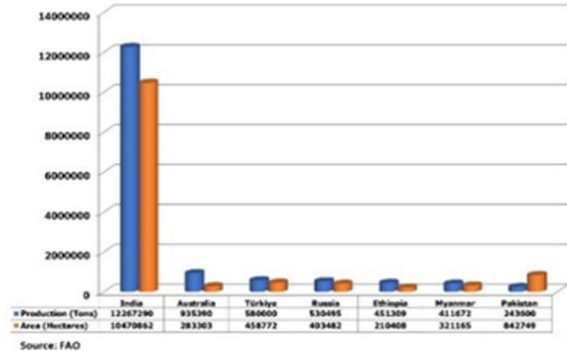
Gram (Chickpea)



Global Overview

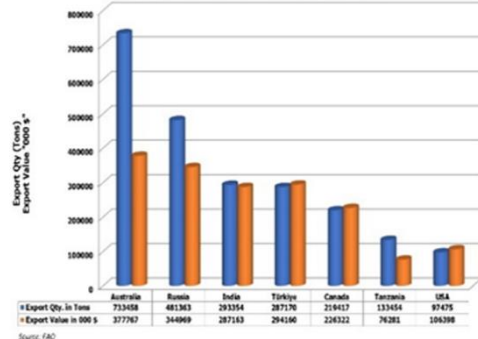
- As per FAO records, the leading chickpea-producing countries include India, Australia, Türkiye, Russia, Ethiopia, Myanmar, and Pakistan, among others.
- During year 2023, India retained its position as the world's largest chickpea producer, having extensive cultivated area and the highest overall output. Pakistan ranked seventh globally, producing 243,600 tons across 842,749 hectares.

Country Wise Area & Production of Chick peas, dry 2023

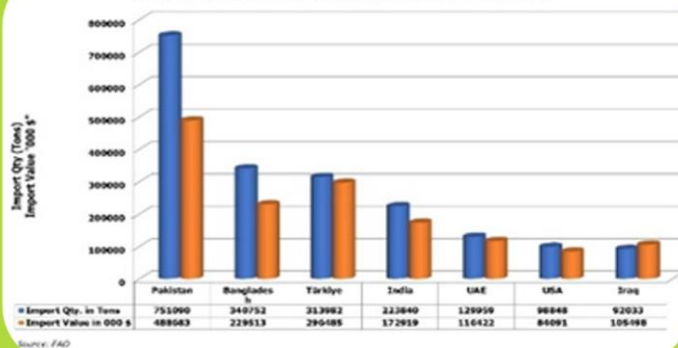


- Countries participate in chickpea exports depending on their production scale and domestic consumption requirements.
- FAO data reveals that Australia was the top chickpea exporter in year 2023, exporting 733,458 tons and earning USD 377.7 million in revenue.
- Other prominent exporters included Russia, India, Türkiye, Canada, Tanzania and the United States—all playing vital roles in the global chickpea trade.
- In year 2023, Pakistan ranked as the world's largest importer of chickpeas, according to FAO data.
- Pakistan was followed by other major importing countries, including Bangladesh, Türkiye, India, the United Arab Emirates, the United States, and Iraq.
- Pakistan imported a substantial 751,080 tons of chickpeas, incurring an import bill of USD 488.6 million.

Country Wise Export Chickpeas in the World 2023



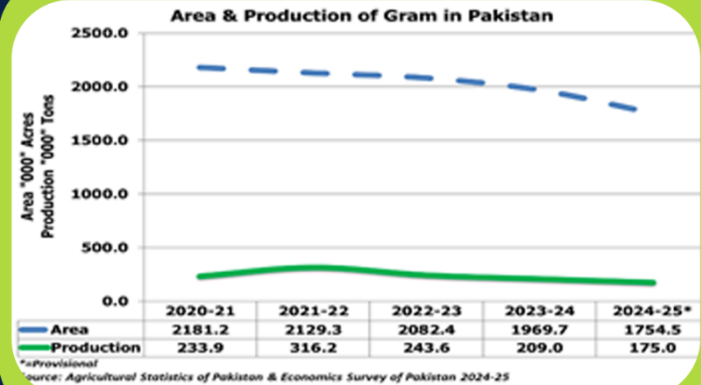
Country Wise Import of Chickpeas in the World 2023



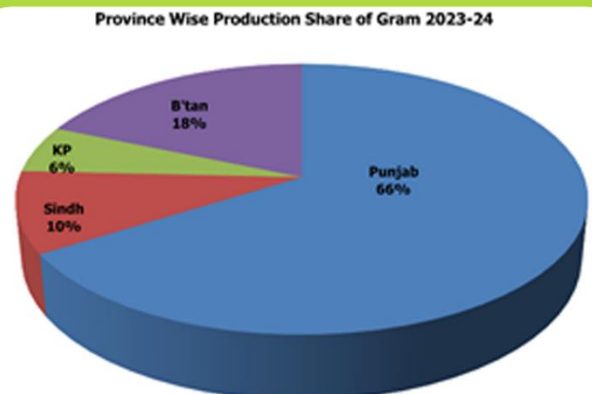
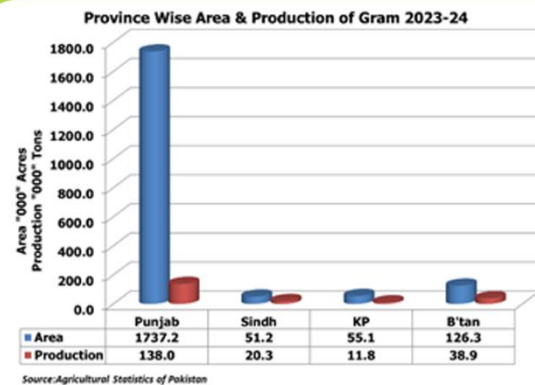


National Overview

- Pakistan's domestic gram production continues to fall short of national demand, primarily due to low crop yield. During year 2024–25, estimated domestic production of gram has been recorded at 1,75,000 tons—reflecting a 16% decline compared to the previous year, whereas 25.18% less in contrast with year 2020-21. This production shortfall has created a significant supply gap, necessitating imports to meet consumption needs.



- During year 2023–24, Punjab alone produced 138,000 tons of gram from 17,37,200 acres, whereas both area and output in the remaining provinces remained comparatively low, underscoring Punjab's central role in national gram production
- Punjab contributes the largest share to the country's gram production at 66%, while Balochistan, Sindh, and Khyber Pakhtunkhwa account for 18%, 10%, and 6%, respectively.



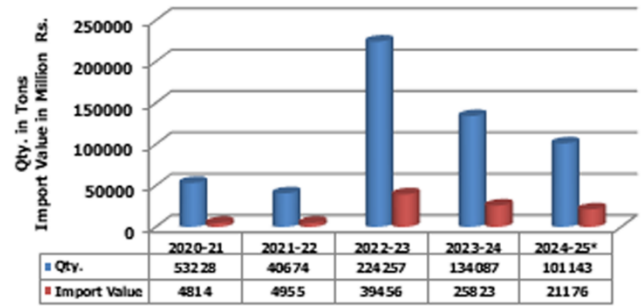


Price Control & Commodities Management Department



- To meet domestic consumption needs and bridge supply gaps, Pakistan relies heavily on gram imports from other countries.
- In the fiscal year 2023–24, Pakistan imported 134,087 tons of gram at a total cost of Rs. 25,823 million. During the July to May period of 2024–25, imports stood at 101,143 tons, amounting to Rs. 21,176 million.

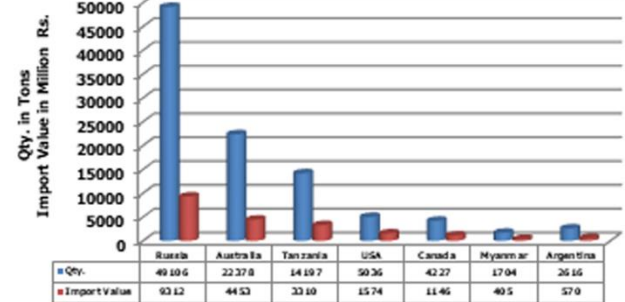
Import of Gram



*-Import during July 2024 to May 2025
Source: PBS & Pakistan Single Window

- The country primarily sources gram from Russia, Australia, Tanzania, the United States, Canada, Myanmar, and Argentina.
- A significant portion of these imports comes from Russia, Tanzania, and Australia, while volumes from other origins remain relatively modest in both quantity and value.

Country Wise Import of Gram 2024-25

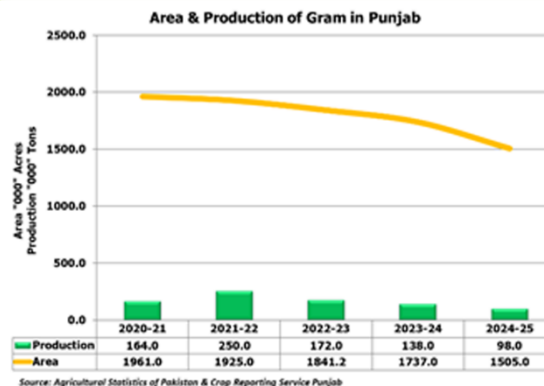


*-Import during July 2024 to May 2025
Source: PBS & Pakistan Single Window

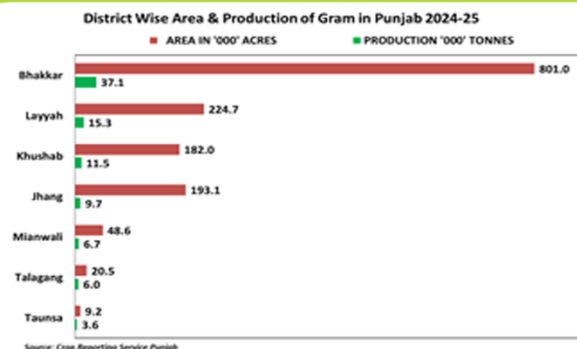


Provincial Overview

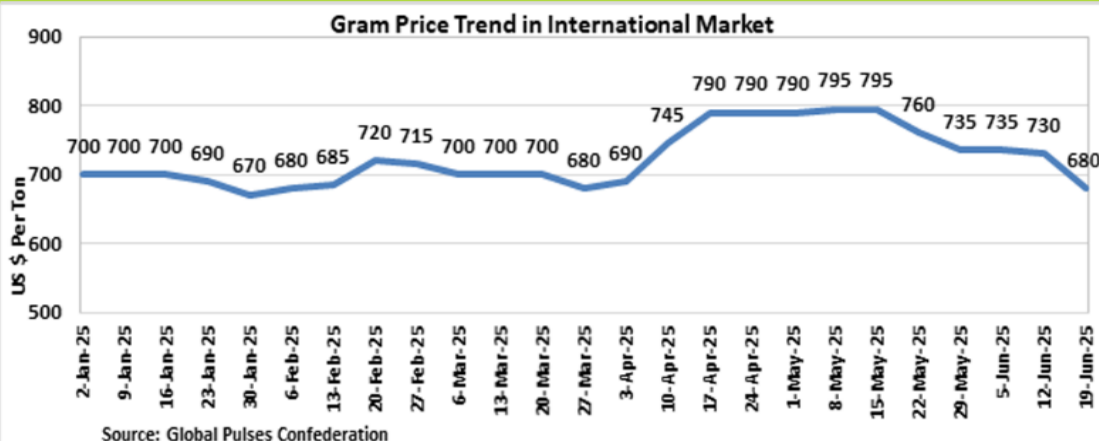
- In Punjab, both the cultivated area and gram production have followed a consistent downward trajectory. Most notably, the province witnessed a sharp 28.98% decline in output during 2024–25 compared to 2020–21 levels. This substantial drop raises concerns over the long-term stability of gram supply in local markets.



- The primary gram-producing districts in Punjab include Bhakkar, Khushab, Jhang, Layyah, Talagang, Mianwali, and Chakwal. Among them, Bhakkar stands out as the top producer, with the largest cultivated area of 8,01,000 acres and the highest production volume at 37,100 tons.



- India is a biggest importer of pulses. Due to imposition of import duty of 10% on import of Gram in India, international prices of gram have decreased from USD 795 per ton to USD 680 per ton. The weekly price trends reported by the Global Pulse Confederation, is outlined below:

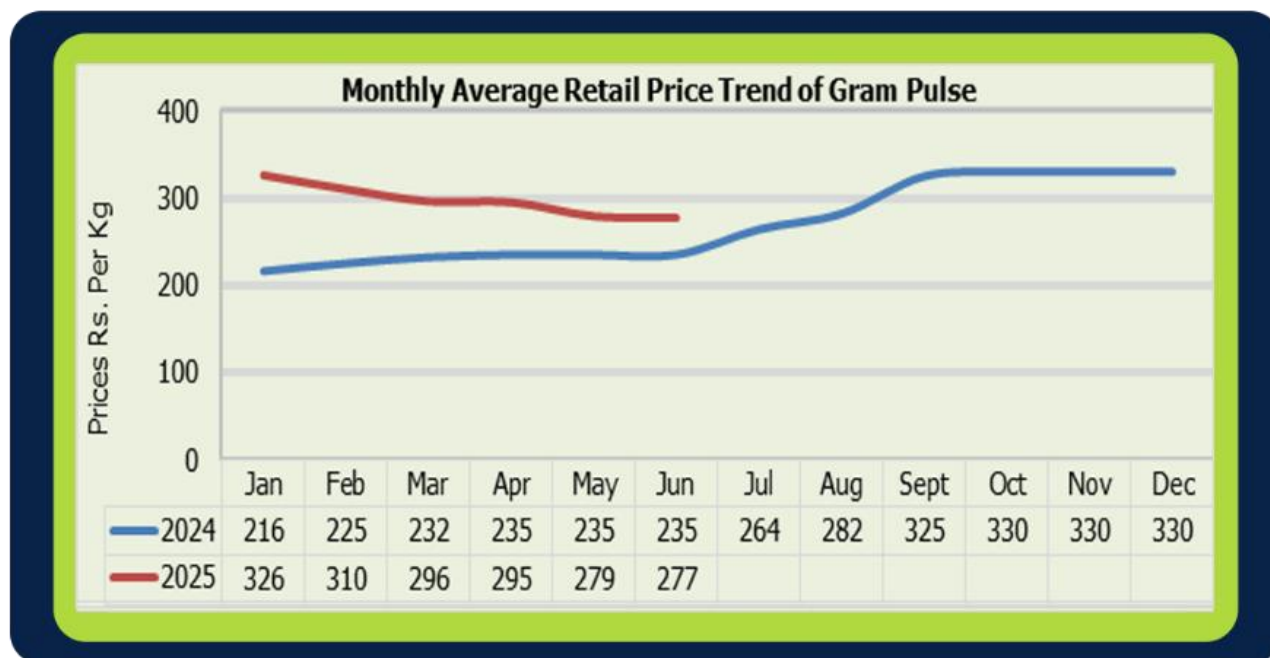




Price Control & Commodities Management Department



- International prices of Gram have declined, due to which local prices are expected to decrease in coming days. Monthly average retail price of gram in Punjab has been recorded at Rs. 277 per kilogram during June.





Price Control & Commodities Management Department



Supply Management Advisory

Assessment

- Local gram is currently available in the market; however, production for 2024–25 has been recorded at just 98,000 tons, indicating a 28.9% decline from the previous year's production of 138,000 tons. This decline in production is primarily attributed to insufficient rainfall and reduced crop yield. Meanwhile, India, the world's largest buyer of pulses, has imposed a 10% import duty on gram w.e.f. April, 2025 to support their farmers and production. This policy move has contributed to a downward shift in international prices of gram from US\$ 795/ton to US\$ 680/ton. Imports are underway to supplement domestic supply, and the global price decline has also caused noticeable decrease (from Rs.295/Kg to Rs.277/Kg) in local gram prices.



Forecast

- Due to low production statistics, import of Gram will be mandatory to meet consumption requirements. However, imposition of 10% import duty has reduced bulk volume of Gram import by India, which eased out supply in international market and causing downward shift in international prices. Moreover, production season in Canada will commence during August–September and supply from Australia is likely to start during October–November. The international prices of Gram are likely to decrease further on the onset of production season in Canada and Australia, and subsequently local prices are also expected to decrease further.



Advisory

- Internationally gram prices have dropped from USD 795/ton to USD 680/ton during April to June. All Deputy Commissioners across Punjab must convene DPCC meetings to revise and reset gram prices in alignment with the decline in international rates.
- Given the continuous decline in gram cultivation and output, the Agriculture Department should prioritize expanding the area under pulses, particularly gram, and promote the adoption of more climate-resilient and drought-tolerant varieties.
- Regular stock monitoring must be carried out to assess availability and prevent hoarding or artificial shortages.
- Additionally, District Administrations should reinforce price control enforcement to ensure true implementation of notified rates in order to safeguard consumer rights



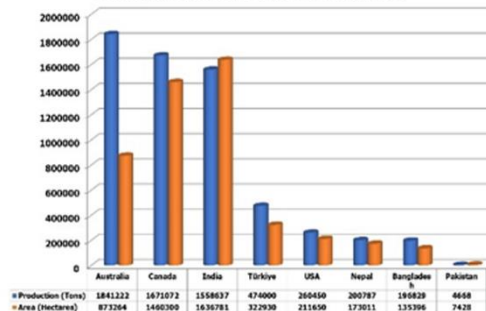
Lentil (Masoor)



Global Overview

- According to FAO data, the major lentil-producing countries include Australia, Canada, India, Türkiye, the United States, Nepal, Bangladesh and several others.
- In year 2023, Australia emerged as the world's top lentil producer, recording the highest production volume globally. Pakistan ranked 20th, with a total output of 4,668 tons cultivated over an area of 7,428 hectares.

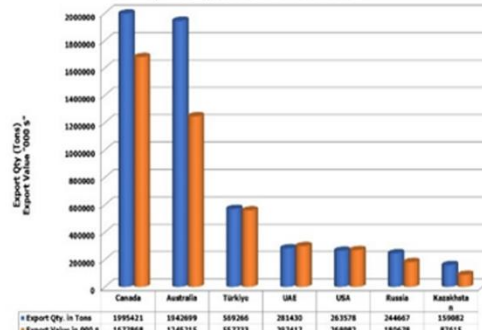
Country Wise Area & Production of Lentil 2023



Pakistan stands at 20th position out of 43 countries in Lentil Production in the World.
Source: FAO

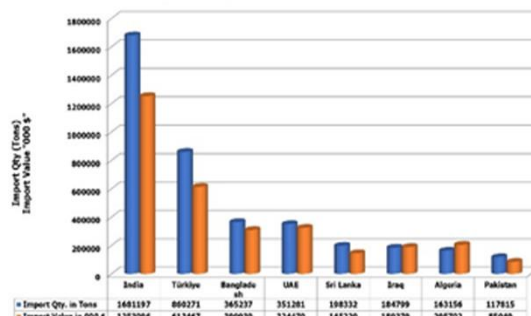
- Canada, while ranking as the second-largest lentil producer globally, claimed the top position among major lentil-exporting nations. In 2023, it exported 1.99 million tons of lentils, generating export revenue of USD 1,677.8 million.
- In row of lentil exporting countries, Canada is followed by Australia, Türkiye, the UAE, the USA, Russia, and Kazakhstan among others.
- In the global lentil import, India emerged as the largest importer in year 2023, surpassing all other countries. It was followed by Türkiye, Bangladesh, the United Arab Emirates, Sri Lanka, Iraq, Algeria and Pakistan.
- Pakistan ranked 8th among lentil-importing countries, with an import volume of 117,815 tons, incurring a foreign exchange expenditure of USD 85.04 million.

Country Wise Export Lentil in the World 2023



Source: FAO

Country Wise Import of Lentil in the World 2023

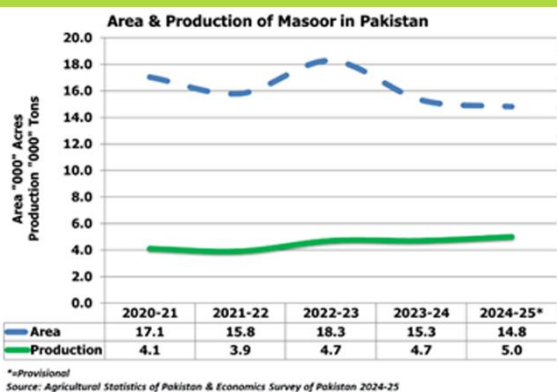


Source: FAO



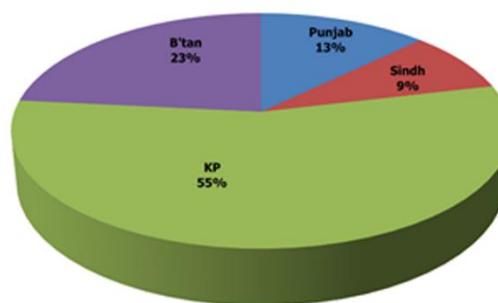
National Overview

- Due to insufficient domestic production, Pakistan remains highly dependent on masoor (lentil) imports to satisfy national consumption requirements.
- The cultivation of masoor has shown a persistent downward trend since 2020–21, with only a slight increase observed in 2022–23. During year 2024-25, estimated domestic production of Masoor has been recorded at 5 million tons only (6.8% higher over last year and 21.9% higher as compared to year 2020-21). Cultivated area has shrunk to 14,800 acres, marking a 3.22% decline from the previous year and a substantial 86.95% reduction compared to year 2020–21.



- In terms of provincial contributions, Khyber Pakhtunkhwa (KP) leads with 55% of the total domestic output, followed by Balochistan (23%), Punjab (13%), and Sindh (9%).

Province Wise Production Share of Masoor 2023-24





Price Control & Commodities Management Department



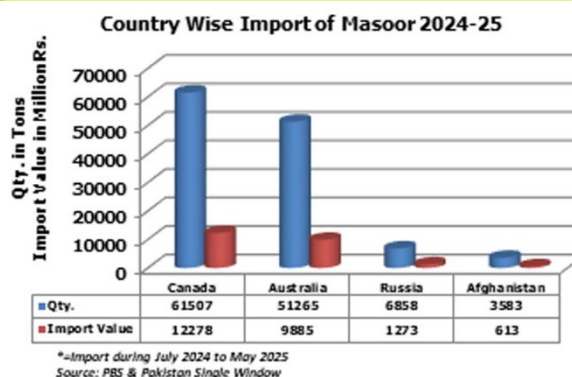
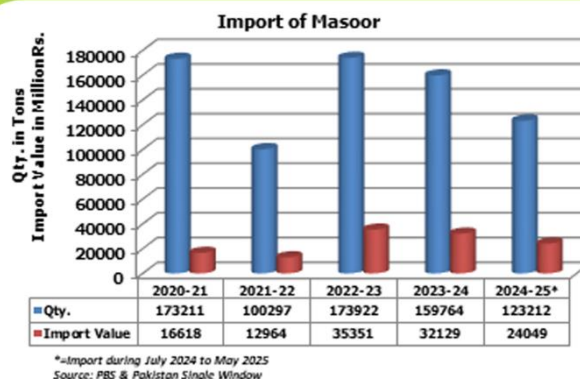
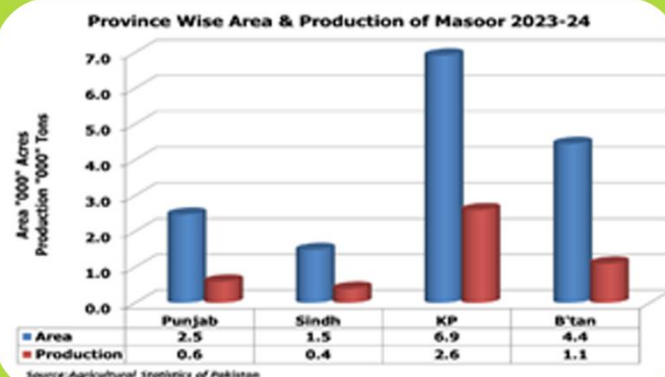
➤ During year 2023-24, Khyber Pakhtunkhwa (KP) being leading masoor producing province attained production of 2600 tons through cultivation over 6900 acres. Balochistan secured production of 1,100 tons, while Punjab and Sindh harvested 600 tons and 400 tons, respectively.

➤ Given the negligible level of domestic production, Pakistan remains substantially dependent on masoor (lentil) imports to fulfill its national consumption

➤ In the fiscal year 2023-24, Pakistan imported 159,764 tons of masoor at a cost of Rs. 32,129 million. During the year 2024-25 (July-May), imports reached 123,212 tons, amounting to Rs. 24,049 million.

➤ The country primarily sources masoor from Canada, Australia, Russia, and Afghanistan, with Canada and Australia contributing the bulk of import volume. In contrast, shipments from Russia and Afghanistan are relatively limited.

➤ During 2024-25 (July to May), Pakistan imported 61,507 tons from Canada at an expense of Rs. 12,278 million, while 51,265 tons were acquired from Australia at a cost of Rs. 9,885 million.

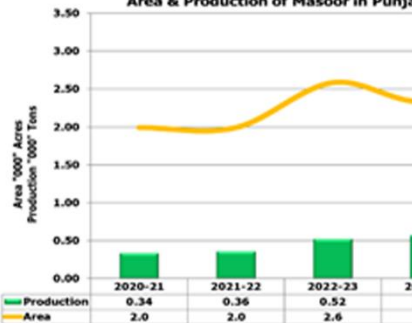




Provincial Overview

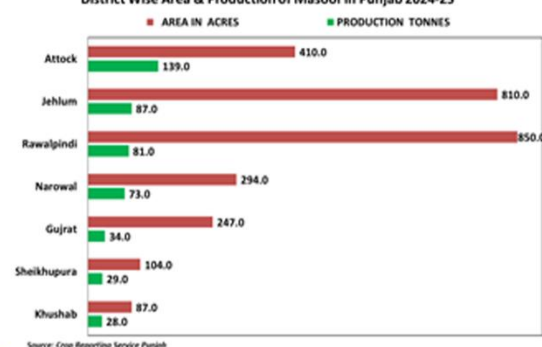
- Punjab contributes only a marginal share to Pakistan's overall masoor production due to its limited provincial output.
- Statistics of cultivated area for masoor in Punjab remain notably low. In year 2024–25, the cultivated area stood at just 3100 acres—reflecting a 34.7% higher from the previous year and a sharp 55% higher compared to 2020–21. Production reached to 546 tons, showing a modest decrease of 3.5% over previous year, yet a significant 61.76% increase relative to year 2020–21.

Area & Production of Masoor in Punjab



- The major masoor-producing districts in Punjab include Attock, Jhelum, Rawalpindi, Narowal, Gujrat, Sheikhupura & Khushab. Among them, Attock leads with the highest production—139 tons—harvested from 410 acres of cultivated land.
- International prices of Masoor have decreased from USD 690/ton to USD 650/ton during the last month. The weekly trend in international masoor prices, as reported by the Global Pulse Confederation, is illustrated below:

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

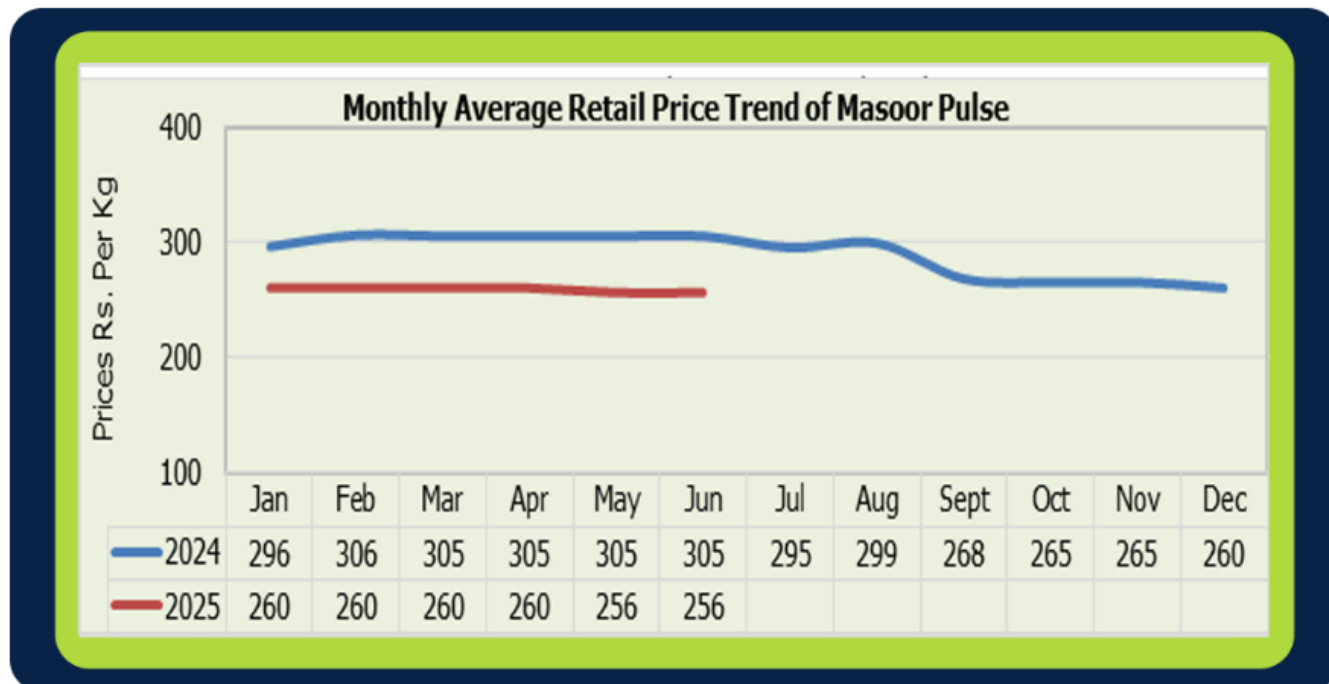


Masoor Price Trend in International Market





- As a result of decline in international prices of masoor, smooth import is in progress which results in slight decrease in local price of Masoor. Monthly average retail price of masoor in Punjab is Rs. 256/kg during June, showing slightly decreasing trend over the last month.





Price Control & Commodities Management Department



Supply Management Advisory

Assessment

- Pakistan's masoor supply relies almost entirely on imports. With international prices witnessing a downward trend, the import process remains uninterrupted, ensuring a stable domestic supply. Consequently, local market prices of masoor are also showing a slightly declining trend.



Forecast

- Smooth import is driven by the decrease in international prices of lentil, ensuring supply & price stability in local markets. Moreover, production season of lentil in Canada will begin during August-September and in Australia will start during October-November. Commencement of production season in Canada and Australia will further stabilize the international market and bring further downward trend in global prices. Thus, import of lentil is expected to remain stable and prices are likely to decline in accordance with availability of crops from Canada and Australia.



Advisory

- All Deputy Commissioners across Punjab must convene DPCC meetings to revise and reset prices of Masoor in alignment with the decline in international rates and ensure implementation of the revised rates through Price Control Magistrates.
- The District Administration, with the help of relevant DO (PAMRA) / Secretaries Market Committee, should maintain close coordination with local importers, traders and commission agents to monitor global masoor market trends and ensure timely and consistent imports to stabilize local supply.
- Simultaneously, the Agriculture Department must prioritize expanding the area under masoor cultivation and promote the adoption of climate-resilient and drought-tolerant varieties to reduce dependence on imports.



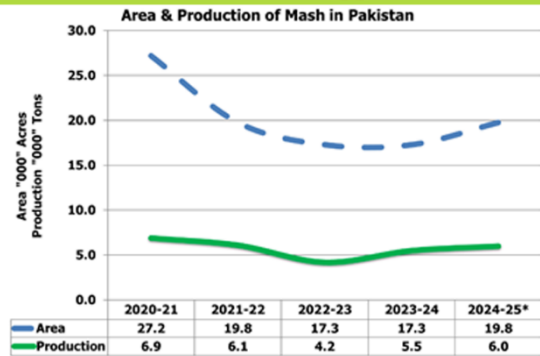


Mash

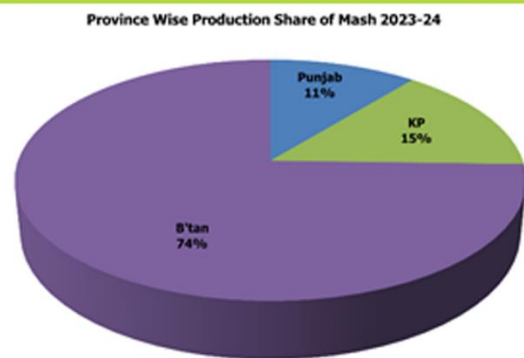
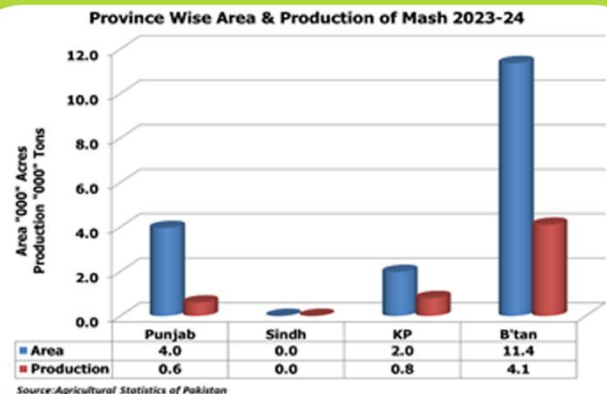


National Overview

- Domestic mash production remains extremely limited, with approximately 92% of the nation's consumption demand fulfilled through imports.
- In the fiscal year 2024–25, local mash output has been recorded at just 6,000 tons, while the national consumption requirement stood at 144,900 tons—highlighting a substantial supply gap of 138,900 tons.



- The area under cultivation and domestic production of mash have shown a gradual downward trend in recent years. In 2023–24, Pakistan produced 5,590 tons of mash, harvested from 17,300 acres. While production saw a slight increase compared to the previous year, the cultivated area remained unchanged.
- In terms of provincial contributions, Balochistan led with 74% of total production (4,100 tons), followed by Khyber Pakhtunkhwa at 14% (800 tons), and Punjab at 12% (600 tons). Sindh's contribution remained negligible.

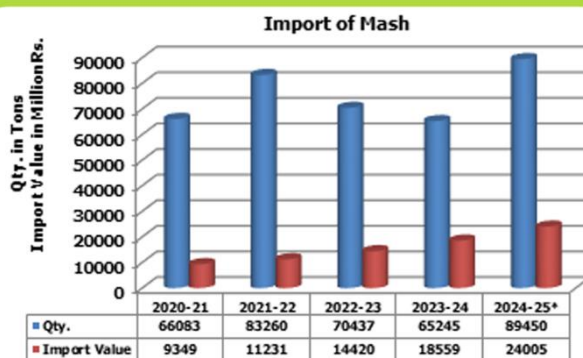




Price Control & Commodities Management Department



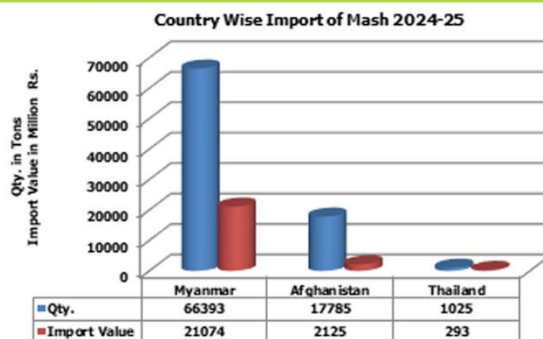
- Given the constrained domestic output, Pakistan must rely heavily on imports to meet national consumption needs.
- During 2023–24, the country imported 65,245 tons of mash at a cost of Rs. 18,559 million. During year 2024-25 (July–May), imports surged to 89,450 tons, incurring cost of Rs. 24,005 million.
- The bulk of these imports originated from Myanmar, Afghanistan, and Thailand, with Myanmar and Afghanistan being the primary sources.



*Import during July 2024 to May 2025
Source: PBS & Pakistan Single Window



- During 2024-25 (July to May), Pakistan imported 66,393 tons of mash from Myanmar and 17,785 tons from Afghanistan, while imports from Thailand recorded at 1025 tons

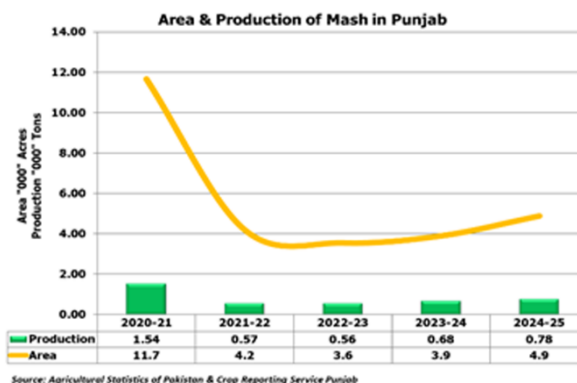


*Import during July 2024 to May 2025
Source: PBS & Pakistan Single Window

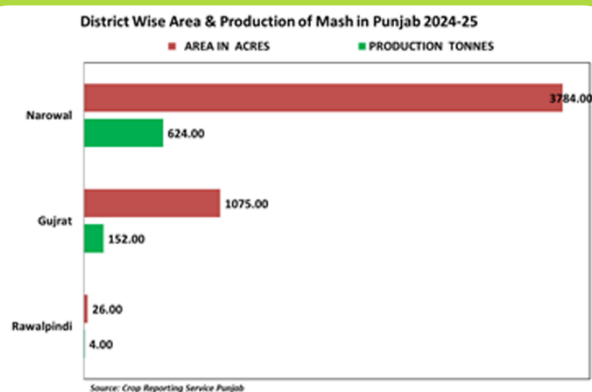


Provincial Overview

- In the fiscal year 2024–25, both the production and cultivated area of mash exhibited a modest recovery relative to the previous year.
- The area under cultivation expanded to 4900 acres, marking a 25.6% year-on-year increase. Nevertheless, this figure remains considerably lower—showing a steep decline of 58.1%—when compared to the cultivated area recorded in 2020–21. Likewise, mash production reached 780 tons in 2024–25, reflecting a 14.7% increase compared to the previous year. However, this output remains 49.3% lower than the production level achieved in 2020–21, indicating a long-term decline.



- In Punjab, the primary mash-producing districts include Narowal, Gujrat, and Rawalpindi. Among them, Narowal emerged as the top producer, contributing 624 tons, harvested from a cultivated area of 3784 acres.

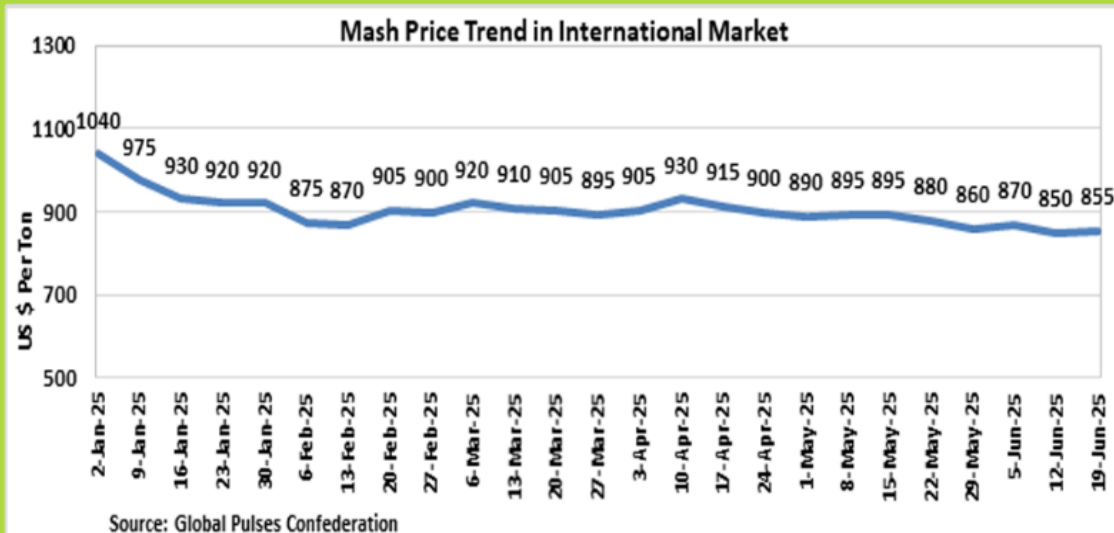




Price Control & Commodities Management Department



- The weekly trend of international prices of mash sourced from the Global Pulses Confederation, is indicating declining trend in international prices of Mash and current international price is US\$ 855/ton.



- Monthly average retail price of mash in Punjab is recorded at Rs. 413/kg during June. As a result of decrease in international prices of Masoor, local price is also depicting declining trend.





Price Control & Commodities Management Department



Supply Management Advisory

Assessment

- Mash production within the country remains minimal, leaving Pakistan entirely dependent on imports to fulfil domestic consumption needs. As international prices of mash continue to decline, local market prices are also reflecting a slight downward trend.



Forecast

- Local mash prices are currently declining due to consistent imports driven by falling international rates. Local prices of Mash are expected to show a steady trend subject to stable international prices.



Advisory

- All Deputy Commissioners across Punjab must convene DPCC meetings to revise and reset prices of Mash in alignment with the decline in international rates and ensure implementation of the revised rates through Price Control Magistrates.
- The District Administration, with the concerned DO (PAMRA) / Secretaries Market Committee, should maintain close liaison with local importers, traders, and commission agents to ensure uninterrupted mash supply through consistent imports.
- The Agriculture Department must initiate efforts to expand the cultivated area for mash and promote the adoption of climate- and drought-resilient varieties.
- Continuous monitoring of mash stock levels by the District Administration is essential to assess availability and anticipate supply or pricing challenges in local markets

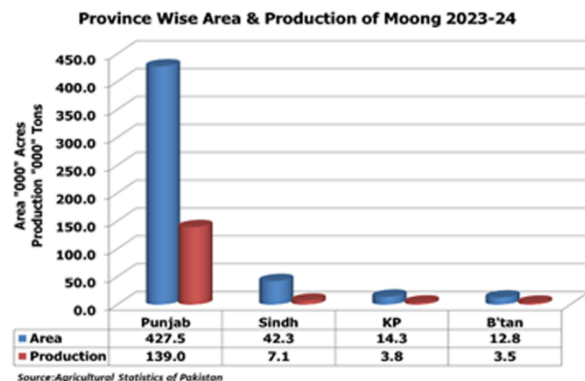
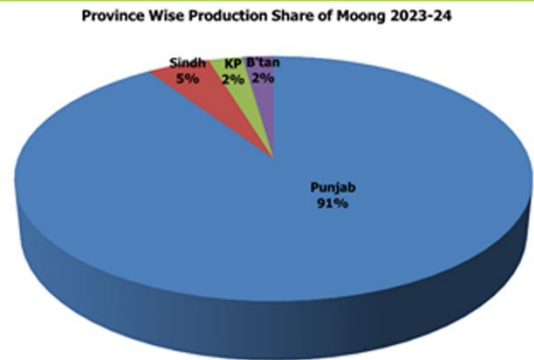
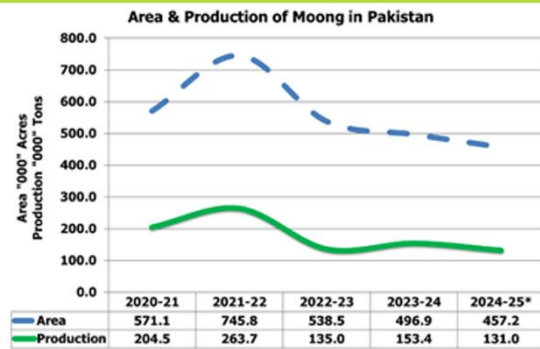


Moong



National Overview

- The cultivated area and domestic production of moong have shown fluctuations over the years, reflecting instability in its cultivation trends across the country.
- In the fiscal year 2024–25, estimated moong production has reached to 131,000 tons—marking a 14.60% decrease compared to the previous year and a 35.9% growth relative to the production level recorded in 2020–21.
- During the fiscal year 2024-25, the area under moong cultivation was documented at 4,57,200 acres, reflecting a 7.92% decrease from the previous year and 19.9% decrease compared to 2020–21. Punjab emerged as the dominant contributor, accounting for 91% of total domestic moong production, followed by Sindh (5%), Balochistan (2%), and Khyber Pakhtunkhwa (2%).
- Punjab led provincial production by harvesting 139,000 tons from 4,27,500 acres. Sindh followed with an output of 7,100 tons, while KP secured third place with 3800 tons. Balochistan recorded the lowest moong production at 3,500 tons.

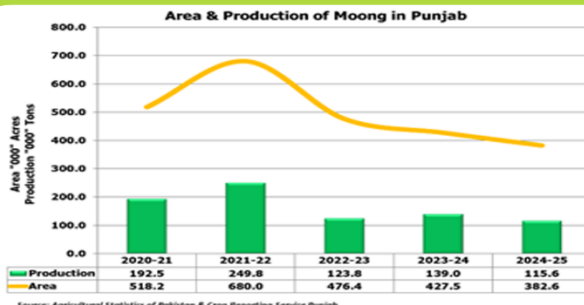




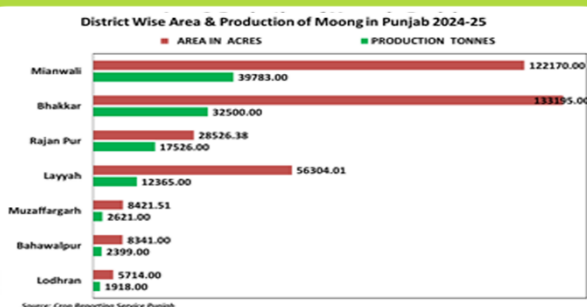
Price Control & Commodities Management Department



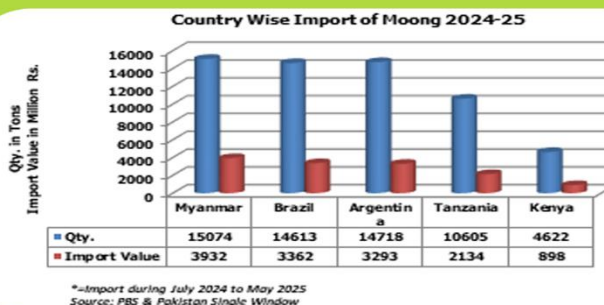
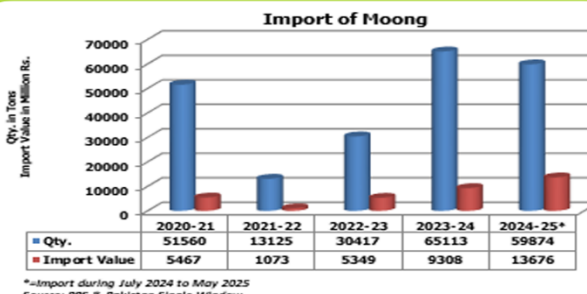
- Over the past two years, Punjab has witnessed a persistent decline in the area allocated for moong cultivation, alongside inconsistent production levels. In 2021–22, the province produced 249,800 tons of moong from 6,80,000 acres, whereas by year 2024–25, both production and cultivated area have dropped significantly to 115,600 tons and 3,82,600 acres, respectively.



- The major moong-producing districts in Punjab include Mianwali, Bhakkar, Rajanpur, Layyah, Muzaffargarh, Bahawalpur, and Lodhran, which collectively contribute a substantial portion of the province's output
- In 2023–24, Pakistan's domestic moong production stood at 153,400 tons against a national consumption requirement of 202,860 tons, resulting in a supply deficit of 49,460 tons. To bridge this gap, the country relies on imports to fulfill domestic demand.



- During 2023–24, Pakistan imported 65,113 tons of moong at a total cost of Rs. 9,308 million. In the ongoing fiscal year 2024–25 (July to May), moong imports have already reached 59,874 tons, incurring an expense of Rs. 13,676 million.
- Pakistan primarily sources its moong imports from Myanmar, Brazil, Argentina, Tanzania, and Kenya.

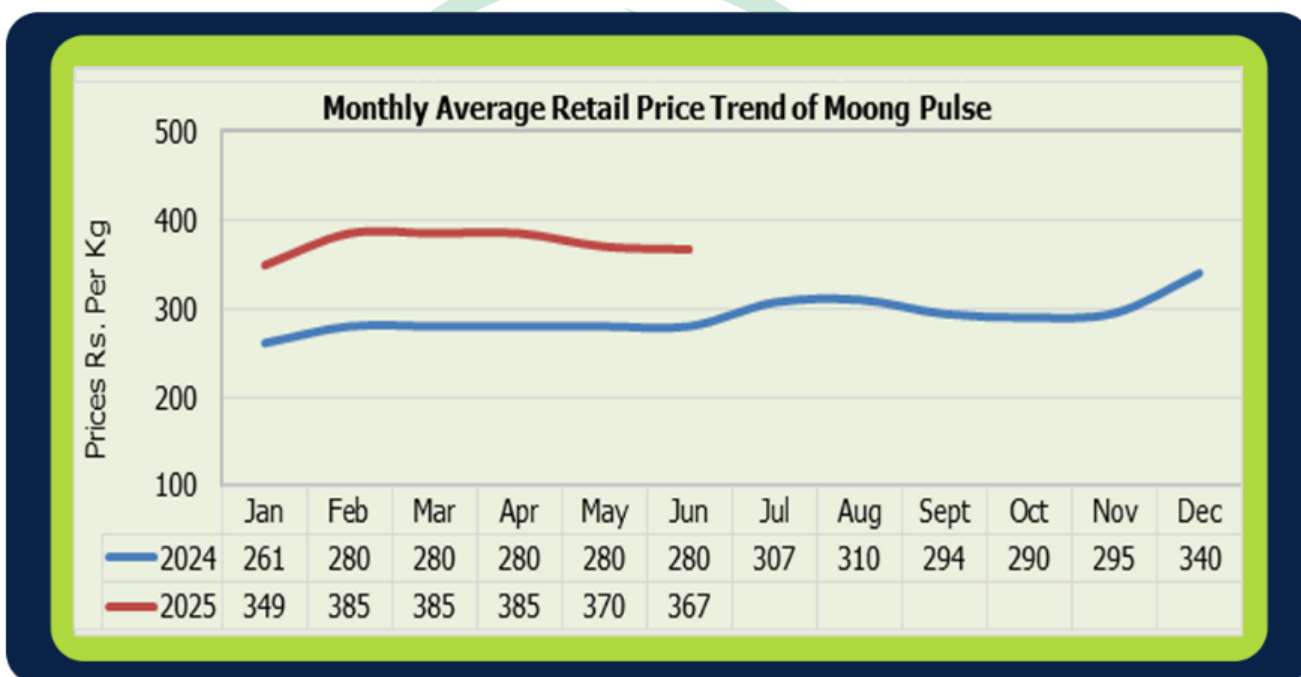




Price Control & Commodities Management Department



- This year, excessive rainfall during the harvesting period adversely impacted the local moong crop, resulting in inadequate production and keeping prices on the higher side. However, the arrival of a minor moong crop in May has helped stabilize the market, leading to a relatively downward price trend. In June, the monthly average retail price of moong in Punjab stood at Rs. 367 per kilogram.





Price Control & Commodities Management Department



Supply Management Advisory

Assessment

- Currently, the moong production season is off in Punjab. Due to reduced domestic production this year, moong prices have remained elevated. To address the consumption gap, imports are ongoing. However, the arrival of a minor moong crop during May has stabilized supply, resulting in a relatively decreasing trend in local market prices.



Forecast

- Owing to the off-season and limited local production, the supply of moong has remained constrained. However, the arrival of a minor crop in May has helped stabilize the supply situation. The main production season is set to begin during July–August, after which supply is expected to normalize and prices are likely to remain within a reasonable range.



Advisory

- All Deputy Commissioners across Punjab must convene DPCC meetings to revise and reset prices of Moong due to availability of minor local crop during May. Moreover, implementation of revised prices should be ensured through regular inspections by Price Control Magistrates.
- The District Administration with the help of concerned DO (PAMRA) / Secretary Market Committee should coordinate with local importers, traders and commission agents to arrange sufficient supply of moong either through import.
- The Agriculture Department must initiate efforts to expand the cultivated area under moong and promote the adoption of improved, climate-resilient and drought-tolerant varieties to boost production.
- Simultaneously, the District Administration should ensure consistent monitoring of available moong stocks to effectively track supply levels and price trends in local markets, enabling timely interventions when necessary.

