FOOD IN FOCUS

June-2026

Directorate of Agriculture
(Economics & Marketing)
Punjab, Food Safety and Consumer Protection Department

Market Insights

Future Market Prospects

Advisory Measures

PREFACE

The Food Safety and Consumer Protection Department presents the twentieth edition of its monthly bulletin, "**Food in Focus: Market Analysis Report**." This publication offers a comprehensive evaluation of the supply and price dynamics of essential food commodities, supported by detailed analysis of domestic production trends, consumption patterns, import and export activities, and significant developments in global markets.

In addition, this edition outlines strategic policy recommendations for the District Administration, Agriculture Department, and Market Committees. It emphasizes the importance of continuous monitoring of essential commodity supplies and the adoption of timely, proactive measures to ensure their uninterrupted availability at affordable prices. The report also highlights the persistent disparity between domestic production and national consumption needs, underscoring the continued reliance on imports to bridge this gap.

We believe that the insights and policy guidance presented in this report will support stakeholders in making informed decisions and leveraging emerging opportunities within an increasingly dynamic food market environment. Through Food in Focus, we aim to continue providing a dependable reference and strategic resource for stakeholders across the food sector.

ABSTRACT

This report has been prepared using data from a wide range of credible and authoritative sources, including the Food and Agriculture Organization (FAO), World Bank, Pakistan Bureau of Statistics (PBS), Agriculture Statistics of Pakistan 2023–24, Economic Survey of Pakistan 2024–25, Federal Board of Revenue (FBR), and the Global Pulses Confederation (GPC), along with the Crop Reporting Service Punjab and Market Committees across Punjab. The report presents a comprehensive analysis of production trends, supply dynamics, price movements, trade patterns, and developments in both domestic and international markets. It also provides in-depth insights into the current market situation, along with an assessment of expected future trends. A concise overview of the prevailing supply and price conditions for major vegetables and pulses is outlined below:

- **Tomato:** Local production season is in progress, resultantly supply & price situation of tomato is stable in local markets. Local production season will prevail till June, 2026. After mid June 2026, tomato price may increase in local markets.
- **Onion:** Main supply of onion is from Punjab and some supply is available from Sindh, however production season in Sindh is near to end. Due to availability of local crop, stability in supply & price situation of onion is being observed.
- **Potato:** As a result of significant local production, supply of potato is in surplus and its prices are on lower side in local markets. Fresh supply from field will be available up till June, 2026, thereafter potato supply will be available from cold storages.
- **Garlic:** Due to availability of local crop, supply of garlic is stable and its prices are on lower side in local markets. Local supply is likely to remain available till July, 2026. Moreover, imports from China is also in progress, which also helps to maintain stability in its supply situation.
- **Ginger**: Due to negligible domestic production, the consumption requirement of ginger is fulfilled through imports throughout the year. At present, imports from Thailand are underway, resulting in a stable supply and price situation in local markets. However, as the ginger production season in Thailand is nearing its conclusion, prices in local markets may witness an upward trend in the coming months.
- **Green chili**: As a result of availability of local crop, supply of green chilies is stable and its prices are experiencing decreasing trend in local markets.
- **Pulses:** Local crop of gram is available, thus its supply and price situation is stable in local markets. International prices of gram are showing slightly increasing trend. As regards Mash, its crop is available in international market from Myanmar, resultantly its international prices are showing declining trend. Thus its import is smooth and subsequently supply & price situation is stable in local markets. In case of Masoor, its international prices are showing increasing trend, which may be observed in local prices as well. In case of moong, prices are on higher side due to stress supply situation. Major local crop is likely to arrive during August 2026, afterwards supply & price situation of Moong is expected to be normal.

Advisory Measures:

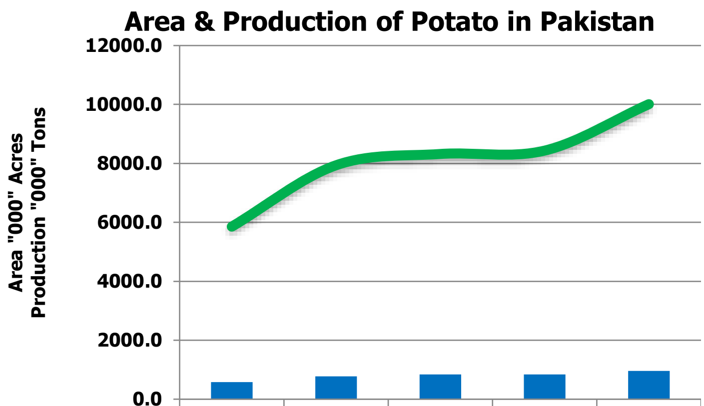
- The District Administration, through the concerned EADA (E&M) and Secretaries Market Committee, should closely monitor the supply and price situation of essential commodities and take all necessary pre-emptive measures to ensure efficient and stable supply chain management. Moreover, commission agents may be persuaded to approach their counterparts based in other provinces to arrange supplies during stress supply period.
- The District Administration should take into consideration the availability of local crop of gram, along with the declining trend in international prices of mash due to the its availability from Myanmar, while determining prices of gram and mash in the meeting of the District Price Control Committee (DPCC).
- The Agriculture Department should expedite research on the development of off-season seed varieties to extend the local production window of major vegetables, and also introduce high-yielding pulse varieties to reduce dependence on imports.

1. Potato

NATIONAL OVERVIEW

Domestic Area & Production:

- Production of poatato in Pakistan exceeds its domestic market needs, leading to a supply surplus. According to data from the Economic Survey of Pakistan and the Agricultural Statistics of Pakistan, the country's potato production reached 10.01 million tons in 2024-25, marking a significant 18.68% increase compared to the previous year.
- During year 2020-21 to year 2024-25, both the area under potato cultivation and total production have exhibited a consistent upward trend.

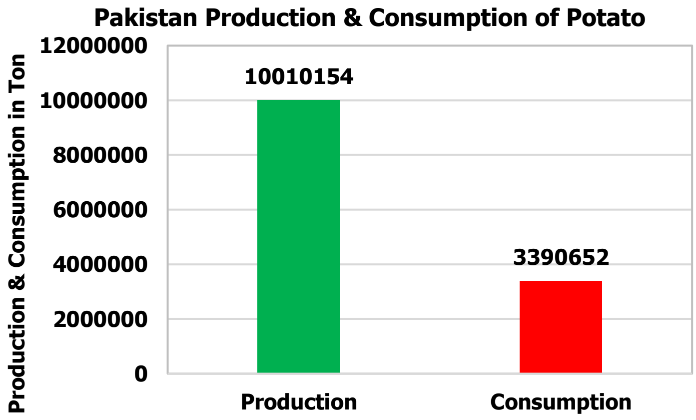


	2020-21	2021-22	2022-23	2023-24	2024-25
Area	579.1	776.2	841.6	837.0	955.5
Production	5854.2	7936.9	8319.8	8434.1	10010.2

Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics

Domestic Production & Consumption:

- Annual domestic potato consumption is estimated at 3.390 million tons, while production in year 2024-25 reached 10.010 million tons, generating a substantial surplus of roughly 6.62 million tons.

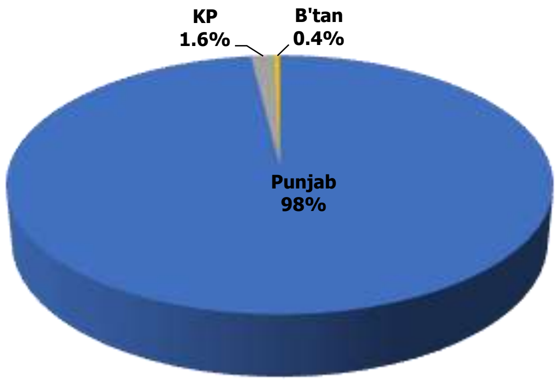


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

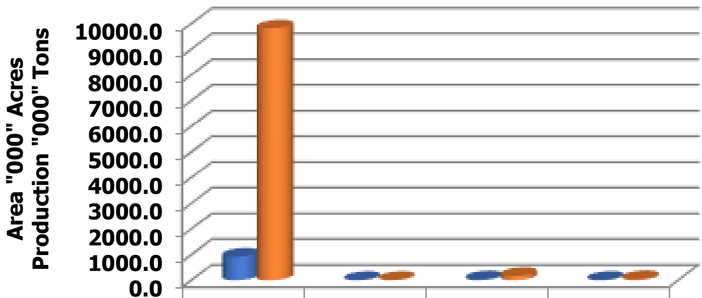
Province wise Area & production:

- Punjab accounts for roughly 98% of the nation's total potato production, which reflects its primary role in potato production hub in Pakistan. In addition to meeting its own consumption needs, the province acts as the main supplier to other regions, while the contributions from other provinces remain comparatively minor.
- In year 2024-25, Punjab produced 9.812 million tons of potato across 921,600 acres. In contrast, Khyber Pakhtunkhwa yielded 157,700 tons, representing just 1.6% of the national total. Production levels in Balochistan and Sindh were significantly lower, at 36,800 tons and 2,700 tons, respectively.

Province Wise Production Share of Potato 2024-25



Province Wise Area & Production of Potato 2024-25



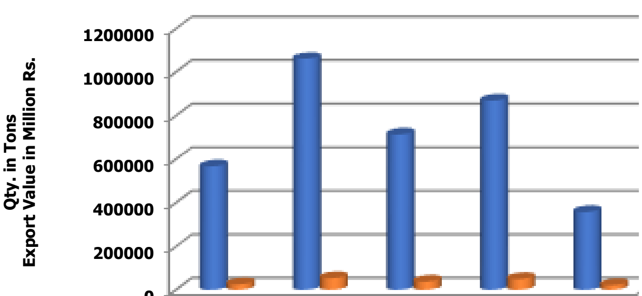
	Punjab	Sindh	KP	B'tan
Area	921.6	0.7	27.4	5.8
Production	9812.9	2.7	157.7	36.8

Source: Pakistan Bureau of Statistics (PBS)

Export Insights:

- Due to substantial potato production, Pakistan exports a significant quantity each year to secure foreign exchange. In fiscal year 2024–25, potato exports reached 868,605 tons, bringing in Rs. 48,905 million in revenue. During July to April of the 2025–26 fiscal year, export volumes amounted to 3,57,561 tons, yielding Rs. 20,990 million in foreign exchange earnings.

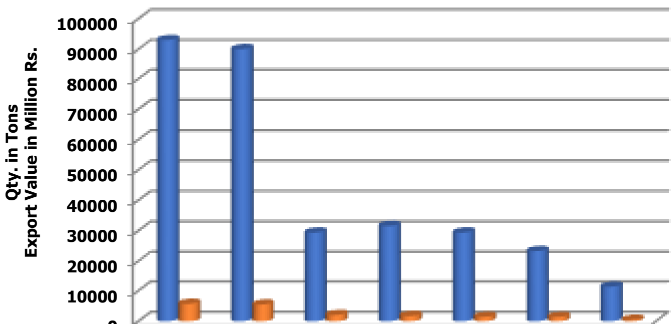
Export of Potato



	2021-22	2022-23	2023-24	2024-25	2025-26*
Qty.	566205	1060756	713951	868605	357561
Export Value	24891	52779	37386	48905	20990

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

Country Wise Export of Potato 2025-26



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

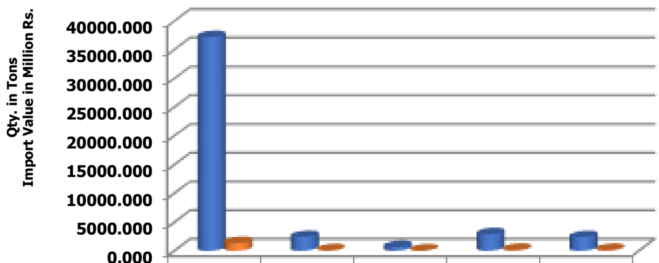
**=Export during July 2025 to April 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

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

Import Insights:

- As a result of its ample domestic production, Pakistan does not depend on potato imports to meet consumption demand; only a minor amount is imported exclusively for use as seed. In year 2024–25, total imports stood at 2,392 tons, while no imports have been recorded so far in 2025–26 (July–April). These seed imports come mainly from Afghanistan and Iran.

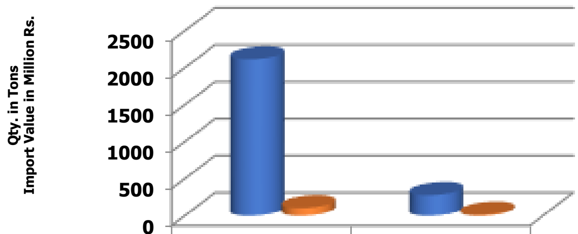
Import of Potato



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

Source: PBS & Pakistan Single Window

Country Wise Import of Potato 2024-25



	Afghanistan	Iran
Qty.	2115	277
Import Value	102	13

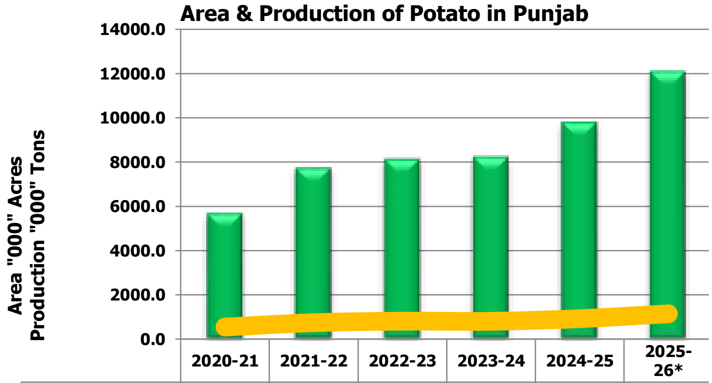
Source: Pakistan Single Window

PROVINCIAL OVERVIEW

Area & Production:

- Over the past five years, potato cultivation and production in the province have followed a consistently upward trend. In year 2025–26, the harvested area increased to 1,142,000 acres, a 23.9% rise from the previous year.
- Similarly, potato production in Punjab climbed to 12.11 million tons in year 2025–26, marking a 23.4% increase compared to the year before. Key potato-producing districts in Punjab include Okara, Pakpattan, Kasur, Sahiwal, Vehari, Khanewal, and Toba Tek Singh. Among these, Okara stands out as the top producer, with a total production of 2.480 million tons.

Area & Production of Potato in Punjab

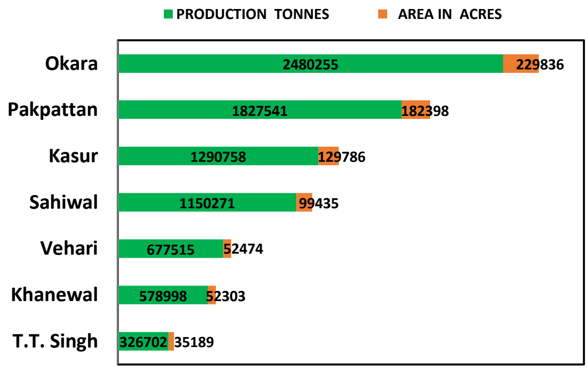


	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26*
Production	5682.0	7736.0	8136.1	8236.3	9812.9	12110.0
Area	545.0	740.0	808.0	803.0	921.6	1142.0

*=Provision

Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

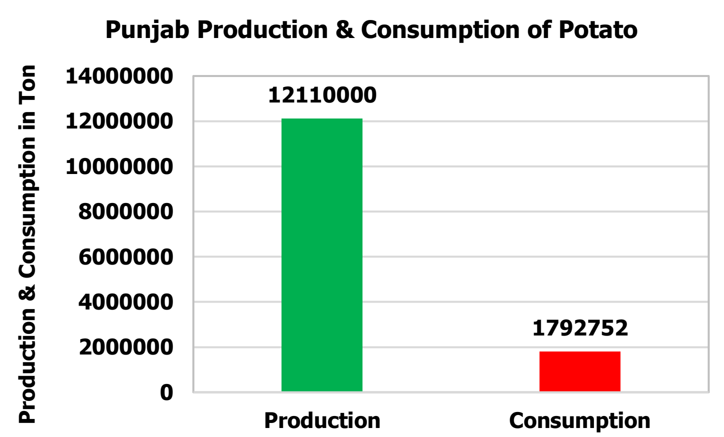
District Wise Area & Production of Potato in Punjab 2024-25



Source: Crop Reporting Service Punjab

Provincial Production & Consumption:

- In year 2025–26, Punjab produced 12.1 million tons of potatoes, against an estimated provincial consumption requirement of 1.792 million tons. This resulted in a considerable surplus of approximately 10.3 million tons in the province's overall potato supply.



Source: Crop Reporting Service Punjab & Agricultural Statistics of Pakistan

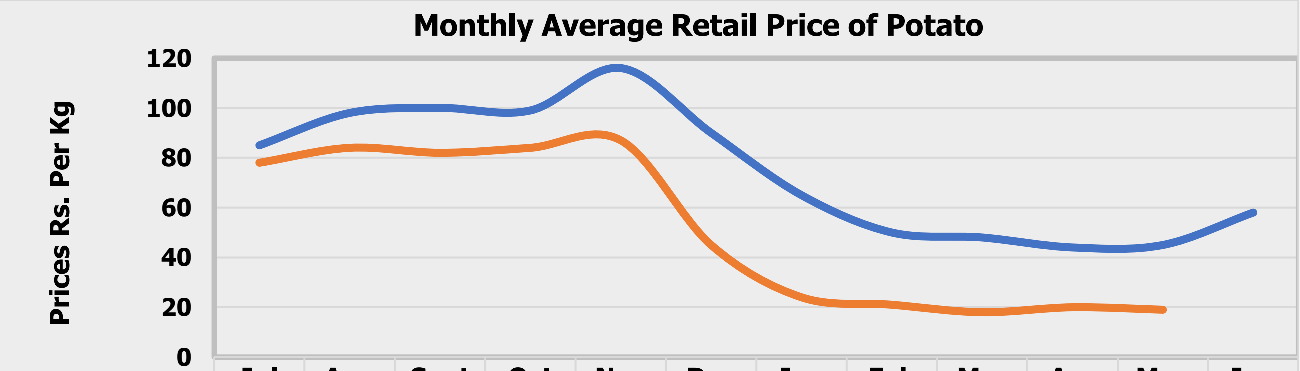
Supply Cycle:

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

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

Retail Market Prices:

- Due to availability of local crop, a large volume of fresh potato is available in local markets at very low prices. In May 2026, the monthly average retail price for fresh potato stood at Rs. 19 per kilogram, which is far lower than last year.



	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2024-25	85	98	100	99	116	90	65	50	48	44	45	58
2025-26	78	84	82	84	87	45	24	21	18	20	19	

SUPPLY MANAGEMENT ADVISORY

Assessment

This year, Punjab's potato production appeared to be 12.1 million tons, which represents a 23.4% increase over the previous year, according to the Crop Reporting Service (CRS) Punjab. This sharp rise in production has created a supply surplus, leading to relatively low potato prices in local markets.

Forecast

- With the local crop abundantly available, potato supply is expected to remain stable, and prices are likely to stay on the lower side. However, direct field supplies will not be available from June onward due to rising temperature.
- In June, potato supply will arrive from local cold storages, which may cause a slight increase in potato prices.
- Furthermore, fresh supplies from Khyber Pakhtunkhwa and Balochistan are anticipated during June and July, which will supplement the market's availability of fresh potato.

Advisory

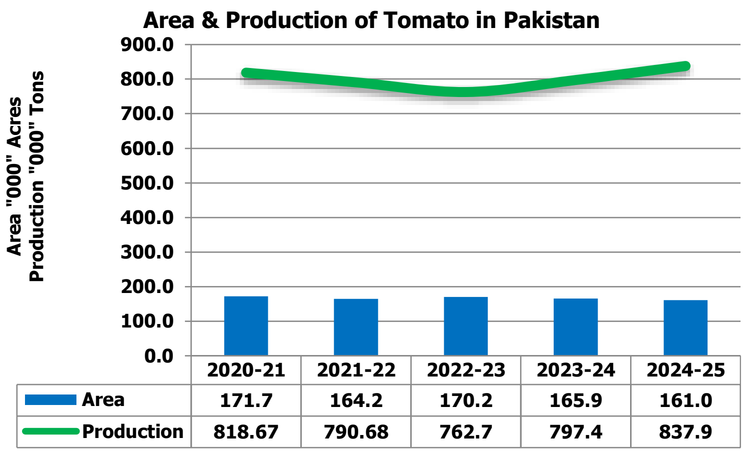
- As per report of Pakistan Bureau of Statistics (PBS), a wide gap between retail notified prices and open market prices is being observed, which should not happen due to availability of local crop in significant quantum. Price Control Magistrates must ensure that notified retail prices are truly implemented in local markets.
- EADA (E&M) and Secretaries Market Committee should regularly oversee auction proceedings in Agricultural Produce Markets to ensure that prices are determined in a fair and transparent manner.

2. TOMATO

NATIONAL OVERVIEW

Domestic Area & Production:

- Even though the area for tomato cultivation has slightly decreased, domestic tomato production has kept rising steadily over the last three years. In year 2024–25, total tomato production across the country reached 837,925 tons, a 5.07% increase from the previous year. Meanwhile, the harvested area fell to 161,000 acres, representing a 3.95% decline compared to the year before.

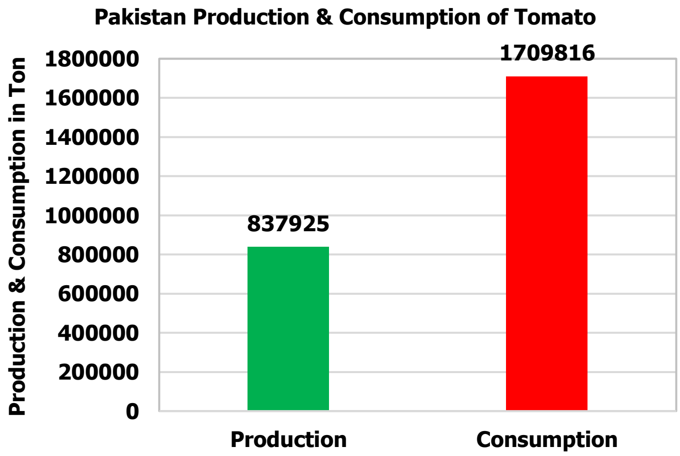


	2020-21	2021-22	2022-23	2023-24	2024-25
Area	171.7	164.2	170.2	165.9	161.0
Production	818.67	790.68	762.7	797.4	837.9

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

Domestic Production & Consumption:

- Despite the steady increase in domestic tomato production, total production remains far below the country's consumption requirements. With an estimated demand of 1,709,816 tons and actual production of only 837,925 tons, Pakistan faces an annual tomato shortfall of 871,891 tons.
- Consequently, Pakistan continues to rely on tomato imports to ensure a consistent and uninterrupted supply in local markets throughout the year

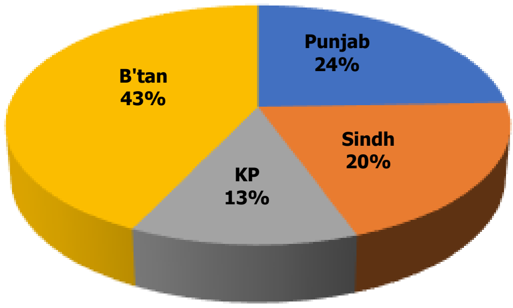


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

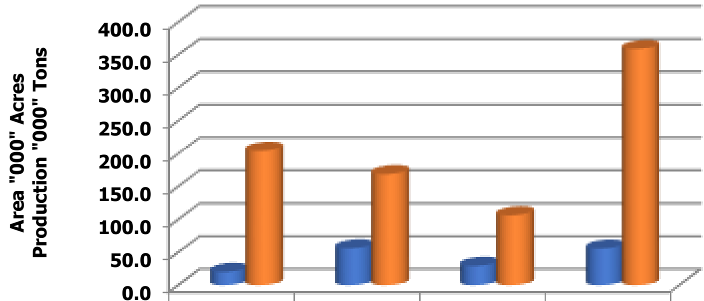
Province wise Area & Production:

- Balochistan is the leading tomato-producing province, contributing 43% of the nation's total production of tomato. Punjab accounts for 24%, Sindh for 20%, and Khyber Pakhtunkhwa for 13% of domestic tomato production.
- In year 2024–25, Balochistan recorded the highest production level at 359,000 tons from 55,800 acres. Punjab followed with 204,000 tons grown on 19,900 acres, while Sindh produced 168,600 tons from 56,200 acres. Khyber Pakhtunkhwa reported the lowest production among the provinces, with 106,300 tons harvested from 29,100 acres.

Province Wise Production Share of Tomato 2024-25



Province Wise Area & Production of Tomato 2024-25



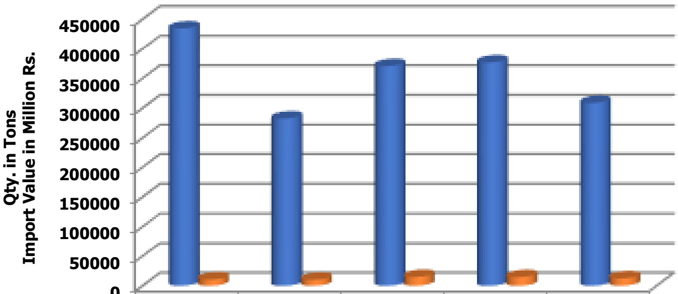
	Punjab	Sindh	KP	B'tan
Area	19.9	56.2	29.1	55.8
Production	204.0	168.6	106.3	359.0

Source:Agricultural Statistics of Pakistan

Import Insights:

- When domestic tomato supplies run low, Pakistan relies heavily on imports from Afghanistan and Iran to meet local consumption needs. In year 2024–25, tomato imports totaled 376,702 tons, with an associated import bill of Rs. 14,554 million. This represents a slight rise in imported volume but a small decrease in overall value compared to the previous year.

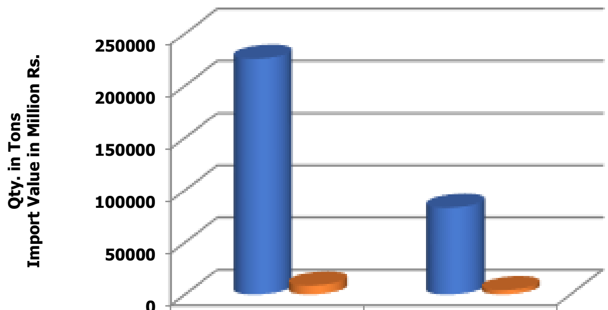
Import of Tomato



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

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

Country Wise Import of Tomato 2025-26



	Afghanistan	Iran
Qty.	225677	83041
Import Value	8483	4053

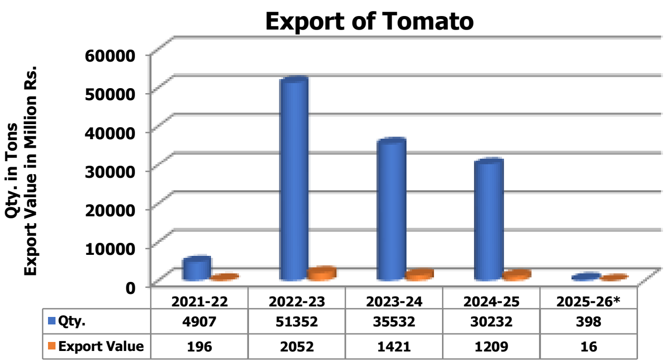
**=Import during July 2025 to April 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

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

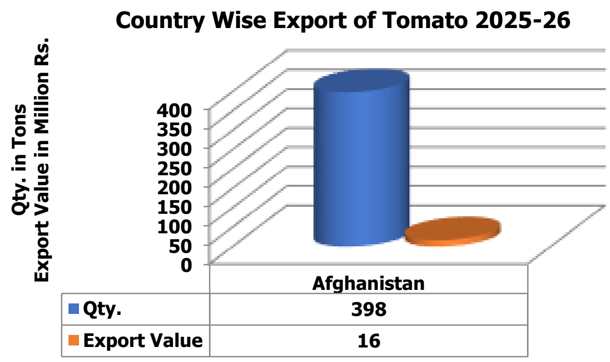
- Afghanistan and Iran remain the main sources of tomato imports for Pakistan. During 2025–26 (July–April), imports from Afghanistan were recorded at 225,677 tons with a cost of Rs. 8,483 million, while imports from Iran stood at 83,041 tons, amounting to Rs. 4,053 million.
- Since December 2025, Punjab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

Export Insights:

- Despite a heavy reliance on imports to meet domestic demand, Pakistan also exports tomato. Although export volumes are considerably lower than imports, they still contribute to foreign exchange earnings.
- In year 2024–25, tomato exports reached 30,232 tons, generating Rs. 1,209 million in revenue, reflecting a slight decline in both quantity and value compared to the previous year. During 2025–26 (July–April), exports totaled 398 tons, earning Rs. 16 million, with Afghanistan as the primary destination.
- Tomato exports are mainly directed to Afghanistan and Iran, particularly between January and May. However, due to border tensions with Afghanistan and the war situation in Iran, tomato exports remained minimal this year.



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

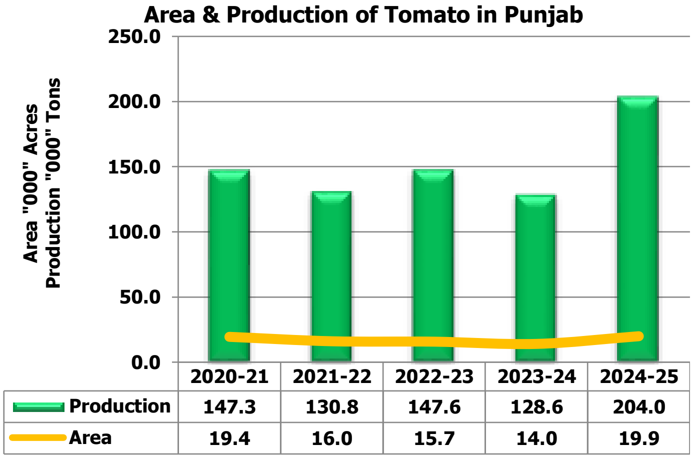


**=Export during July 2025 to March 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics

PROVINCIAL OVERVIEW

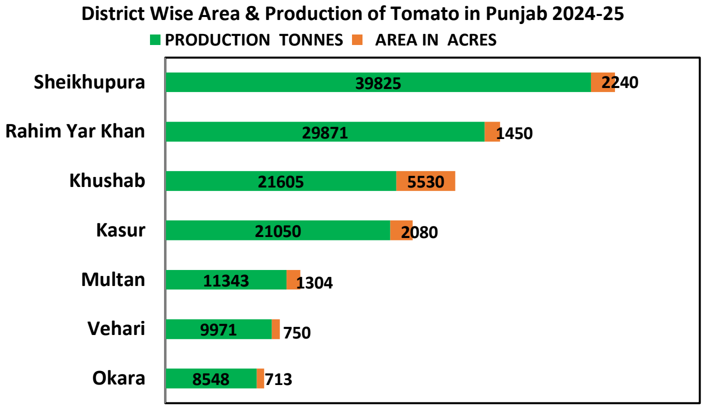
Area & Production:

- Over the past five years, tomato production in Punjab has shown notable fluctuations. In 2024–25, production reached 204,000 tons, which represented a substantial 58.6% increase compared to the previous year.
- The area dedicated to tomato cultivation also expanded to 19,900



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab acres, reflecting a 42.14% rise over the preceding year.

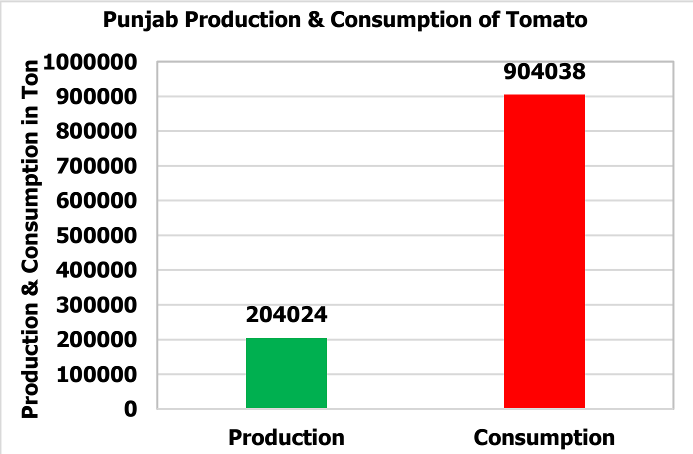
- Tomato production in Punjab is largely centered in several key districts, namely Sheikhupura, Rahim Yar Khan, Khushab, Kasur, Multan, Vehari, and Okara.
- Among these, Sheikhupura ranked as the top-producing district with 39,825 tons, followed by Rahim Yar Khan at 29,871 tons, and Khushab in third place with an production of 21,605 tons.



Source: Crop Reporting Service Punjab

Provincial Production & Consumption:

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



Source: Crop Reporting Service Punjab & Agricultural Statistics of Pakistan

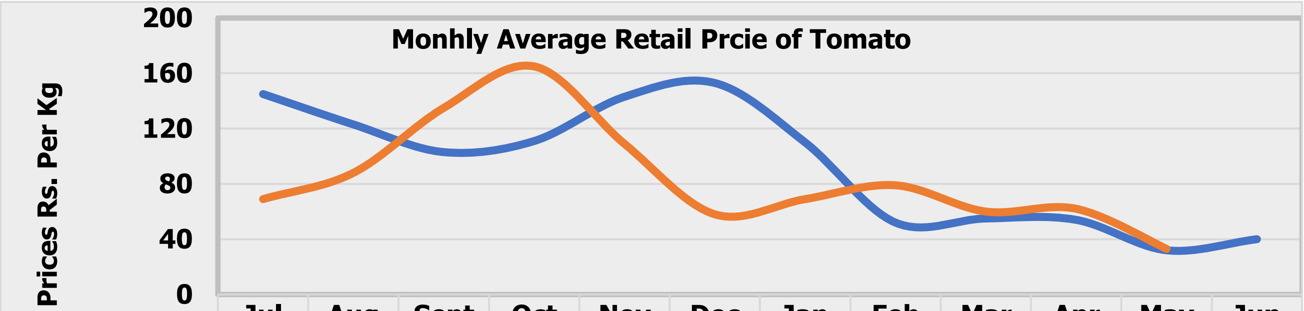
Supply Cycle:

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

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

Retail Market Price:

- As local production season of tomato is in progress, thus its supply is stable and resulatntly prices are showing declining trend in local markets. The monthly average retail price of tomato in Punjab is recorded at Rs. 33 per kilogram in May 2026.



	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2024-25	145	123	103	111	143	153	110	52	55	54	32	40
2025-26	69	88	135	165	109	58	69	79	60	62	33	

SUPPLY MANAGEMENT ADVISORY

Assessment

Local production season of tomato is ongoing, leading to maintain stability in its supply situation and keeping prices on lower side in local markets.

Forecast

Due to availability of local crop, supply & price situation of tomato is anticipated to be normal. Local supply is likely to sustain till June, afterwards tomato supply will be available from KPK and Balochistan. After mid June 2026, local supply will reach to end which may lead to surge in prices due to dependence on other provinces.

Advisory

- With the local tomato crop available, prices should be on the lower side. However, according to the Pakistan Bureau of Statistics (PBS), a wide gap exists between notified retail rates and actual open-market prices. Price Control Magistrates must actively step in to narrow this gap and curb over pricing by the retailers, ensuring that relief of low prices is passed on to the general public.
- The District Administration, in coordination with the relevant EADA (E&M) and Secretaries Market Committee, should closely monitor

the tomato supply & price situation through maintaining close liaison with commission agents. Moreover, commission agents may also be persuaded to approach their counterparts based in other provinces to arrange supplies during coming stress period.

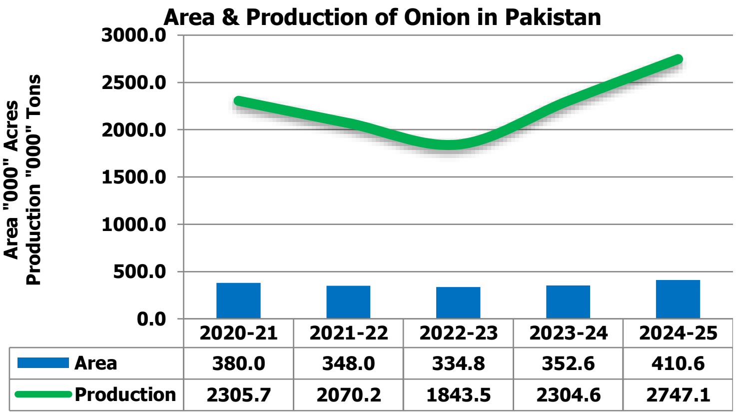
- EADA (E&M) and Secretaries Market Committee should regularly supervise auction proceedings in Agricultural Produce Markets to ensure transparent price determination. They must also ensure strict enforcement of notified wholesale prices within the premises of Agricultural Produce Markets.

3. ONION

NATIONAL OVERVIEW

Domestic Area & Production:

- Over the last three years, Pakistan has seen a steady increase in both onion production and the land used for its cultivation. In year 2024–25, total onion production reached 2.747 million tons, a 19.2% rise from the previous year. During the same period, the harvested area expanded to 410,600 acres, reflecting a year-on-year increase of 16.44%.



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

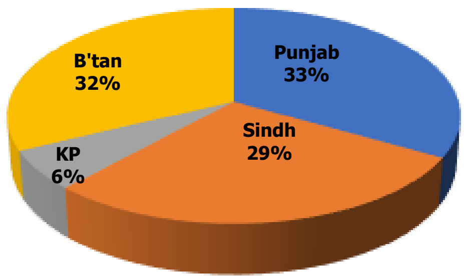
Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Province wise Area & Production:

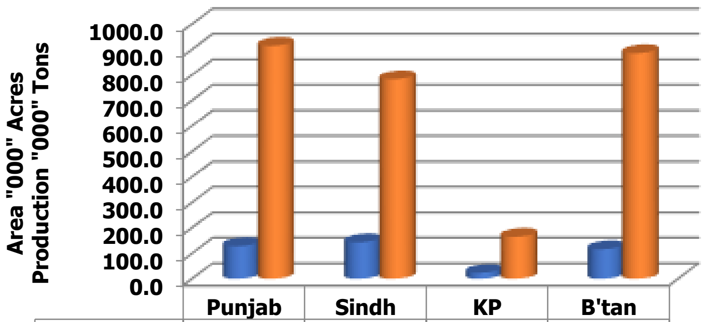
- A significant shift in provincial onion production patterns took place in year 2024–25, when Punjab became the leading producer, accounting for 33% of national production. It was followed by Balochistan at 32%, Sindh at 29%, and Khyber Pakhtunkhwa at 6%.
- By comparison, during year 2023–24, Balochistan ranked first in national onion production, followed by Sindh in second place and Punjab in third. This ranking changed considerably in year 2024–25, as Punjab overtook both provinces to become the country's largest onion-producing province.

- In year 2024–25, Punjab became the top onion-producing province, with a total production of 914,000 tons. Balochistan followed closely, producing 885,400 tons, while Sindh contributed 483,200 tons. Khyber Pakhtunkhwa held a comparatively smaller share, with production recorded at 164,500 tons.

Province Wise Production Share of Onion 2024-25



Province Wise Area & Production of Onion 2024-25



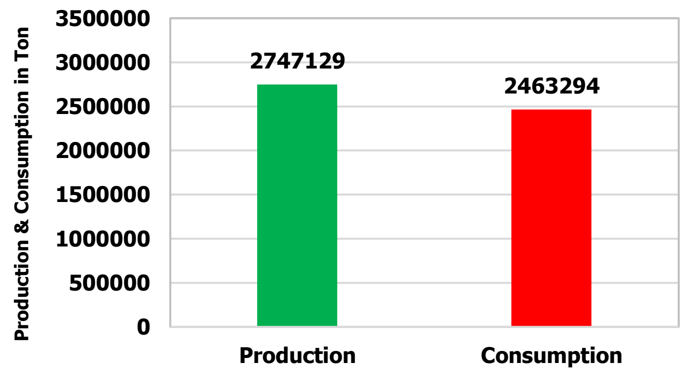
	Punjab	Sindh	KP	B'tan
Area	128.2	143.0	23.1	116.3
Production	914.0	783.2	164.5	885.4

Source:Agricultural Statistics of Pakistan

Domestic Production & Consumption:

- In year 2024–25, national onion production totaled 2,747,129 tons, falling short of the estimated consumption requirement of 2,463,296 tons, creating a deficit of 283,833 tons. To fill this gap, imports from Afghanistan and Iran are necessary.

Pakistan Production & Consumption of Onion

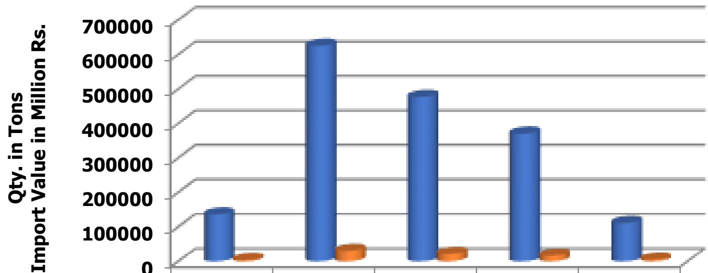


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Import Insights:

- In year 2024–25, Pakistan imported 370,699 tons of onions at a cost of Rs. 16,878 million, marking a decrease in both import volume and value compared to the previous year.
- Conversely, during 2025–26 (July–April), onion imports totaled 110,672 tons, with an expenditure of Rs. 5,208 million. Afghanistan and Iran continued to be the main sources of these imports.
- After December 2026, onion imports will no longer be needed, as sufficient supplies will be available from Sindh and Punjab.

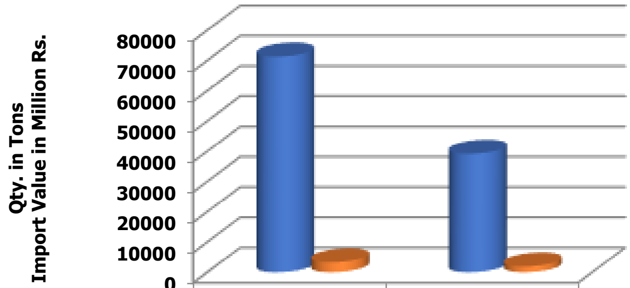
Import of Onion



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

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

Country Wise Import of Onion 2025-26



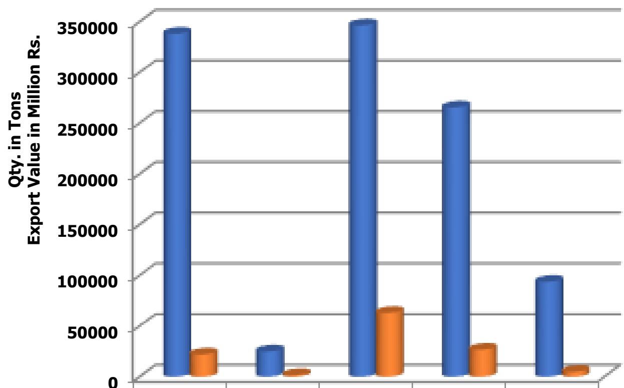
	Afghanistan	Iran
Qty.	71259	39153
Import Value	3287	1909

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

Export Insights:

- In addition to using imports to meet domestic demand, Pakistan also exports onions to international markets, contributing to foreign exchange earnings.
- In 2024–25, onion exports totaled 265,318 tons, generating Rs. 26,466 million, though both volume and value saw a decline from the previous year. During 2025–26 (July–April), exports reached 93,591 tons, earning Rs. 4,793 million in foreign exchange.
- Pakistan's onion exports are primarily destined for Malaysia, the United Arab Emirates, Sri Lanka, Oman, Qatar, Singapore, and Bahrain. Among these, shipments to Malaysia, the UAE, and Sri Lanka remained significantly higher than those to other markets.

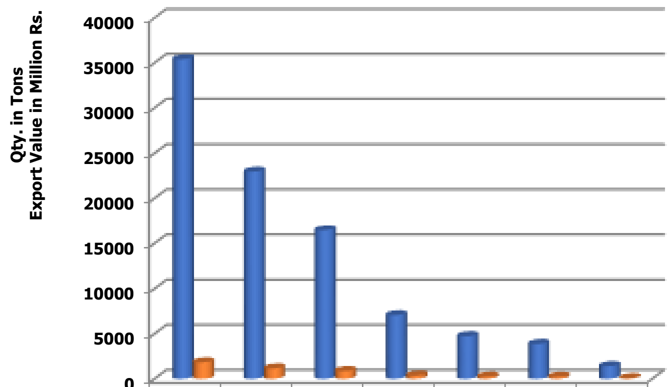
Export of Onion



	2021-22	2022-23	2023-24	2024-25	2025-26*
Qty.	338160	24715	346378	265318	93591
Export Value	21741	1477	63092	26466	4793

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

Country Wise Export of Onion 2025-26



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

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

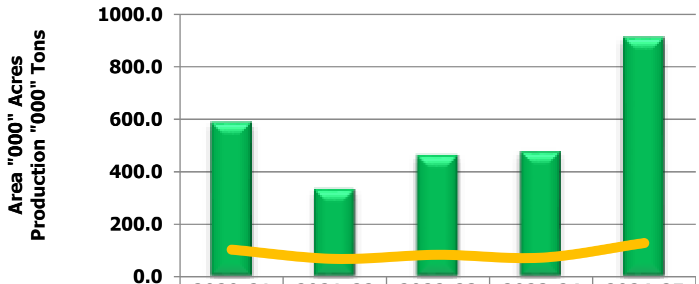
PROVINCIAL OVERVIEW

Area & Production:

- Over the past four years, onion production in Punjab has shown a steady upward trend, even though the cultivated area has fluctuated during this period.

- In year 2024–25, the area under onion cultivation expanded significantly to 128,200 acres, marking a sharp increase of 77.3% compared to the previous year. As a result, onion production jumped to 914,000 tons, reflecting an impressive growth of 92.5% over the preceding year.

Area & Production of Onion in Punjab

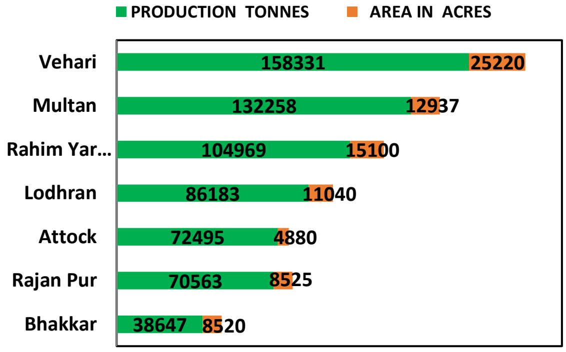


	2020-21	2021-22	2022-23	2023-24	2024-25
Production	587.6	333.0	462.2	474.6	914.0
Area	103.0	67.7	83.4	72.3	128.2

Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

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

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

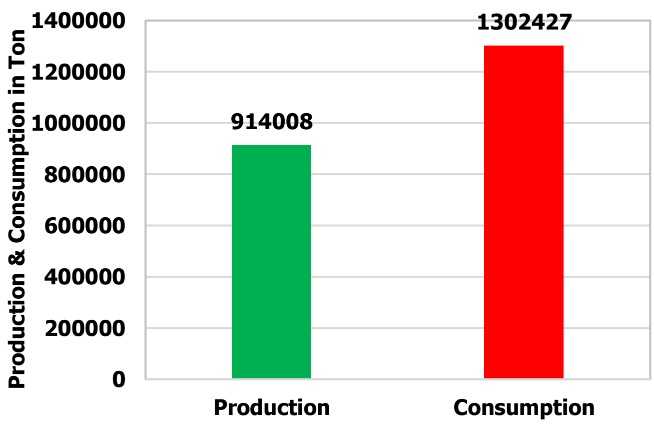


Source: Crop Reporting Service Punjab

Provincial Production & Consumption:

- In fiscal year 2024–25, the province produced 914,008 tons of onions, which fell short of the estimated provincial demand of 1,302,427 tons, resulting in a significant deficit of 388,419 tons.

Punjab Production & Consumption of Onion



Source: Crop Reporting Service Punjab & Agricultural Statistics of Pakistan

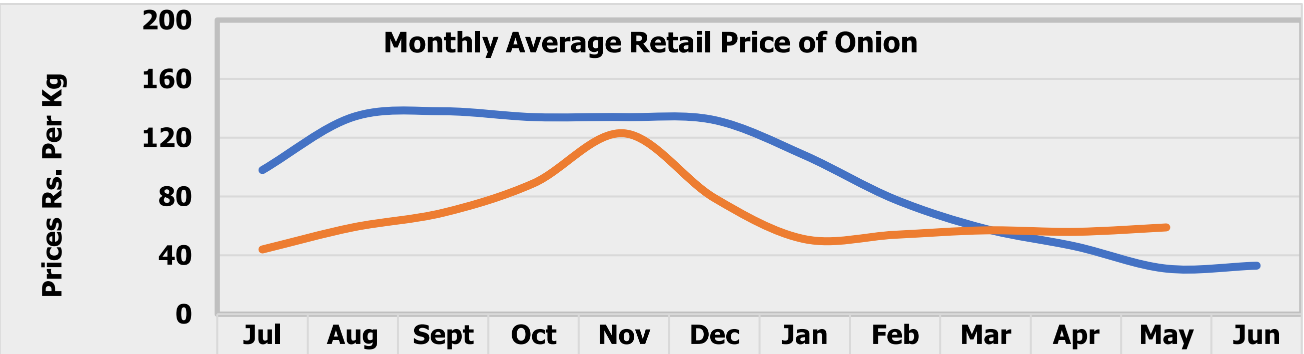
Supply Cycle:

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

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

Market Price:

- Due to sufficient availability of local crop along with some arrival from Sindh, 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:



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

SUPPLY MANAGEMENT ADVISORY

Assessment

Currently, main supply of onion is arriving from Punjab due to ongoing production season and production season in Sindh is approaching to its end. Due to availability of local crop, supply & price situation of onion is normal in local markets.

Forecast

- Local production season of onion is expected to prevail till end June 2026 till then supply & price situation of onion is likely to remain stable.
- During June-2026, supply of onion will also start arriving from KPK and Balochistan, which will improve supply situation.
- After July, local supply will reach to end, thereafter price may show increasing trend in local markets due to dependence on other provinces.

Advisory

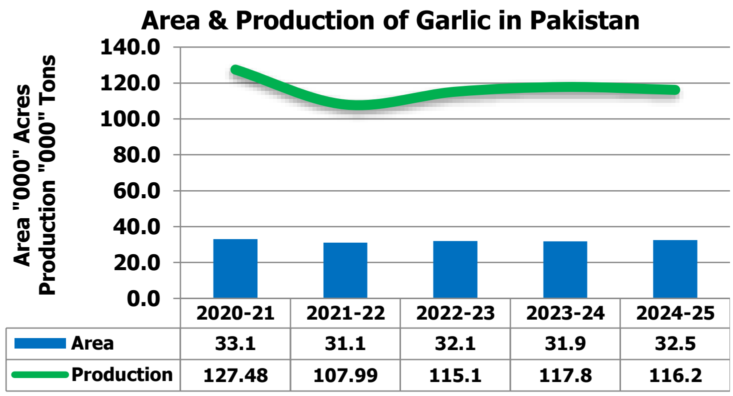
- Due to availability of local crop, onion prices should be on the lower side. However, according to the Pakistan Bureau of Statistics (PBS), a wide gap exists between notified retail prices and actual open-market rates. Price Control Magistrates must take active measures to close this gap and prevent over charging by retailers.
- The District Administration, in coordination with the relevant EADA (E&M) and Secretaries Market Committee, must consistently monitor onion availability and maintain a steady supply keeping close coordination with commission agents. Moreover, commission agents may be persuaded to approach their counterparts based in other provinces to arrange supplies during coming stress period.
- The EADA (E&M), Secretaries Market Committee should oversee auction activities in Agricultural Produce Markets, ensuring transparent price discovery and the strict enforcement of officially notified rates.

4. GARLIC

NATIONAL OVERVIEW

Domestic Area & Production

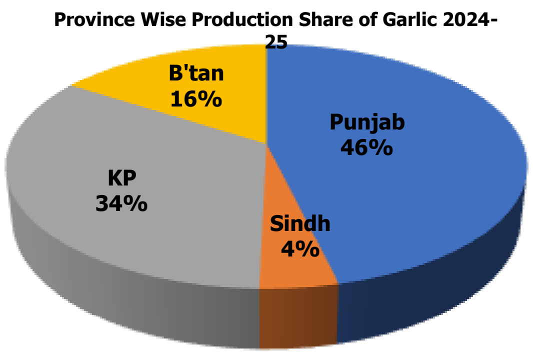
- Garlic cultivation in Punjab has followed a largely steady pattern in both area and production in recent years.
- In the 2024–25 season, the land used for garlic growing increased to 32,500 acres, a slight rise of 1.88% from the previous year. However, domestic production totaled 116,200 tons, showing a small decline of 1.35% compared to the earlier period.

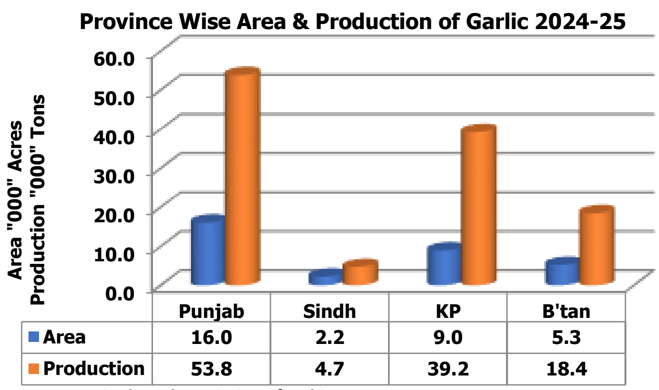


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Province wise Area & Production:

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

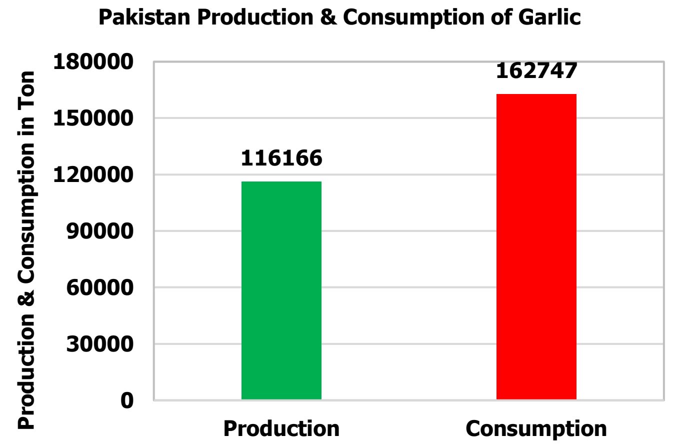




SourceAgricultural Statistics of Pakistan

Domestic Production & Consumption:

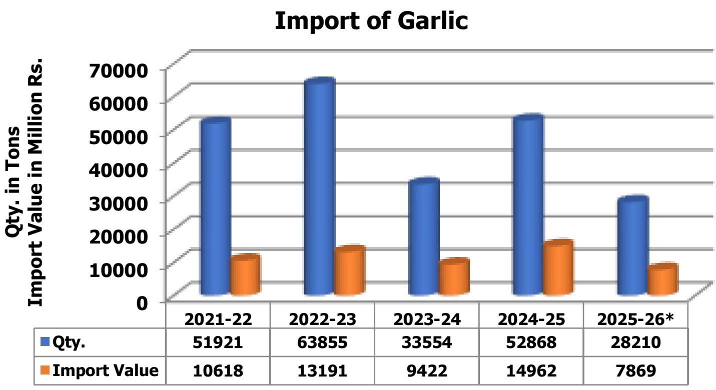
- During the 2024-25 period, domestic garlic production reached 116,166 tons, which fell short of the estimated consumption requirement of 162,747 tons, leading to a deficit of 46,581 tons.



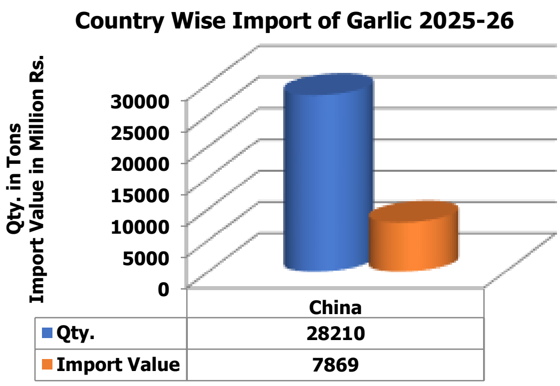
Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Import Insights:

- To meet its annual consumption needs, Pakistan relies heavily on garlic imports, mainly from China. In 2024–25, total garlic imports reached 52,868 tons, costing Rs. 14,962 million. During 2025–26 (July–April), imports from China amounted to 28,210 tons, with an expenditure of Rs. 7,869 million.



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

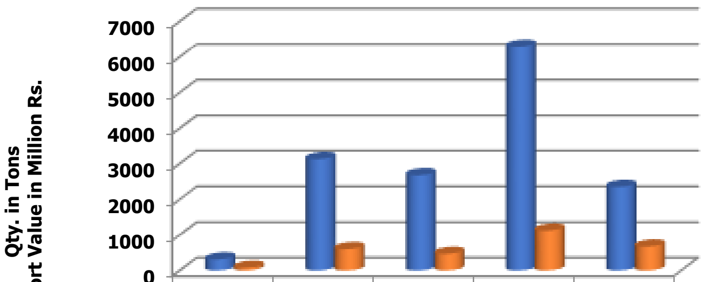


**=Import during July 2025 to April 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics

Export Insights:

- Garlic exports totaled 6,287 tons in 2024–25, generating Rs. 1,123 million in revenue. During 2025–26 (July–April), export volume stood at 2,348 tons, adding Rs. 670 million to foreign exchange reserves.
- The main destinations for Pakistani garlic are the USA, Afghanistan, Kazakhstan, the UAE, Vietnam, the UK, and Tajikistan.
- Afghanistan and the USA received the largest share of export volumes, while shipments to other countries remained comparatively lower. However, in terms of financial returns, exports to the USA yield significantly higher revenue than those sent to Afghanistan.

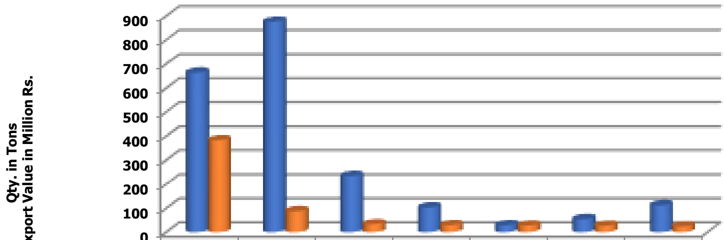
Export of Garlic



	2021-22	2022-23	2023-24	2024-25	2025-26*
Qty.	309	3126	2675	6287	2348
Export Value	75	597	463	1123	670

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

Country Wise Export of Garlic 2025-26



	United States	Afghanistan	Kazakhstan	UAE	Mauritius	UK	Viet Nam
Qty.	663	875	234	103	29	55	112
Export Value	383	88	33	29	27	26	23

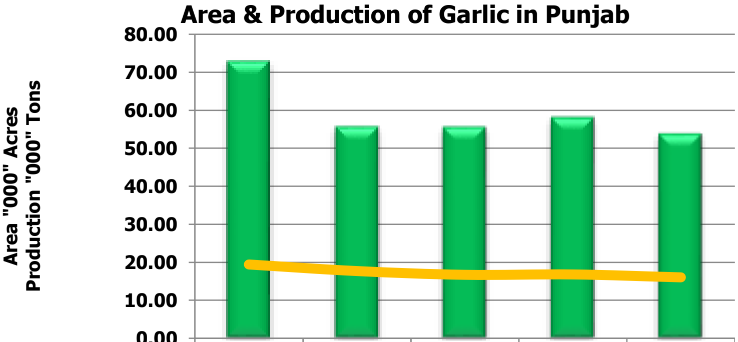
**=Export during July 2025 to April 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

PROVINCIAL OVERVIEW

Area & Production:

- Over the last four years, both the area under cultivation and the production levels of garlic in Punjab have shown a stable trend.
- In 2024–25, the land used for garlic cultivation in Punjab was recorded at 16,100 acres, reflecting a 4.7% decrease from the previous year and a 17.52% drop compared to the acreage recorded in 2020–21.
- Garlic production in the province reached 53,800 tons, which represents a 7.2% reduction from the prior year and a 26.1% decline relative to the production level of year 2020–21.
- The key garlic-growing districts in Punjab include Sahiwal, Attock, Rahim Yar Khan, Layyah, Toba Tek Singh, Faisalabad, and Mandi Bahauddin. Among these, Sahiwal stands out as the largest garlic-producing district, with an production of 9,022 tons from 2,452 acres of cultivated land.

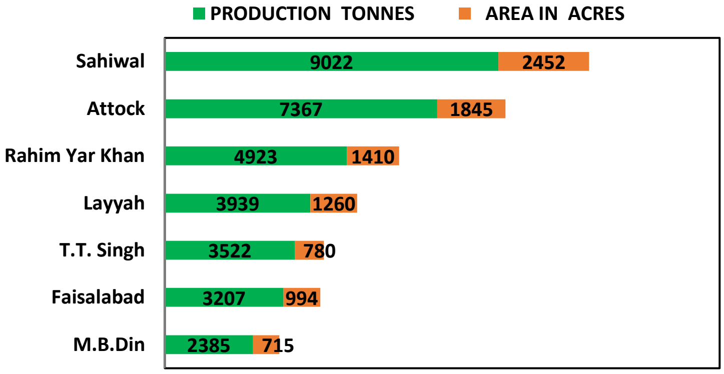
Area & Production of Garlic in Punjab



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

Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

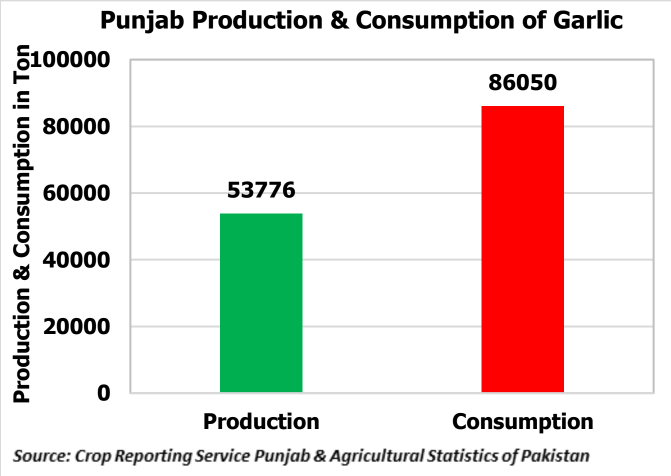
District Wise Area & Production of Garlic Year 2024-25



Source: Crop Reporting Service Punjab

Provincial Production & Consumption:

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



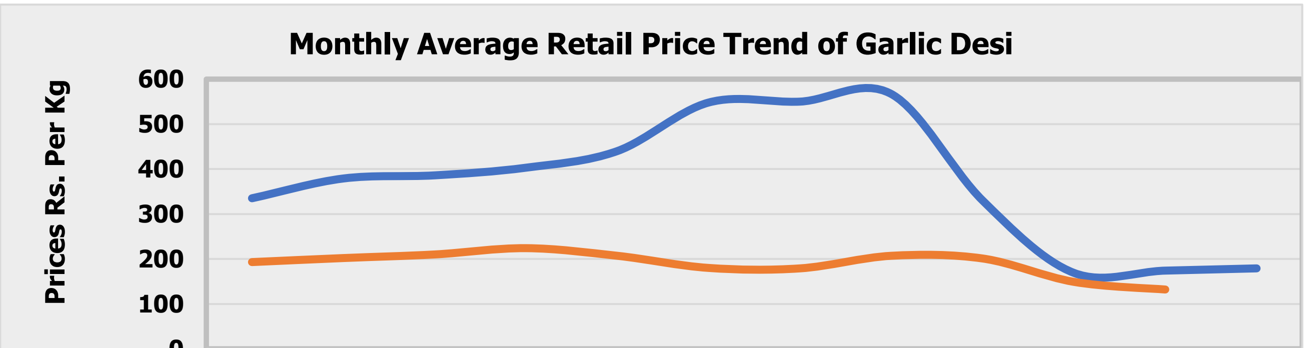
Supply Cycle:

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

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

- **Market Prices:**

  Supply situation of garlic is stable due to availability of local crop and resultantly its prices are on lower side in local markets. Monthly average retail price of garlic in Punjab is Rs.132/Kg during month of May. The graph of monthly average retail price of garlic is given as under:



	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2024-25	335	379	386	403	440	548	550	567	330	169	174	179
2025-26	193	202	210	224	207	180	179	207	201	149	132	

SUPPLY MANAGEMENT ADVISORY

Assessment

Due to availability of local crop, the supply situation for garlic has improved, leading to lower prices in local markets. Additionally, ongoing imports from China are further helping to maintain stability in both the supply and price situation of garlic.

Forecast

Since local supply is currently available, thus garlic availability and prices are expected to remain stable in local markets. Significant quantities of the local crop is likely to remain available till July 2026.

Advisory

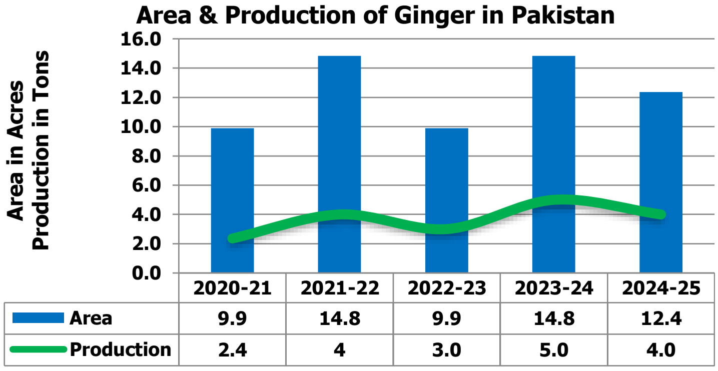
- The District Administration, in coordination with the relevant EADA (E&M) and Secretaries Market Committee, should closely monitor the garlic supply and price situation to ensure uninterrupted availability in local markets.
- EADA (E&M) and Secretaries Market Committee must consistently oversee garlic auctions in Agricultural Produce Markets, ensuring a fair price determination process and the strict enforcement of official wholesale rates within those markets.
- To maintain stable availability and keep prices affordable throughout the year, the processing of garlic into paste should be actively promoted.

5. GINGER

NATIONAL OVERVIEW

Domestic Area & Production

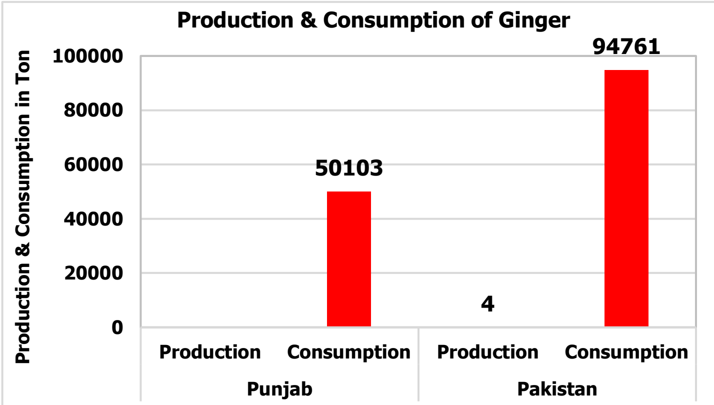
- Domestic production of ginger is almost negligible, that's whay Pakistan is almost completely dependnet on imports to meet its ginger consumption requirements.
- In the 2024-25 year, domestic ginger production was recorded at only 4 tons from a cultivated area of 12,400 acres.



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

Domestic Production & Consumption:

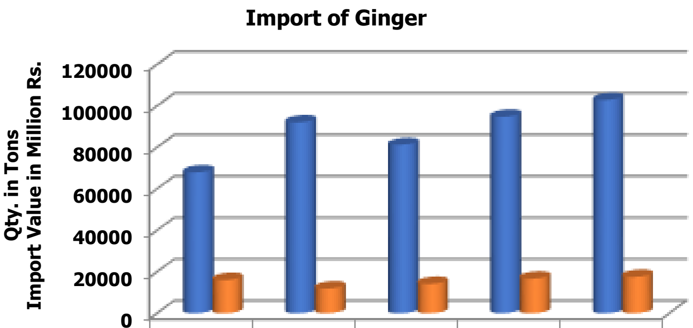
- Domestic ginger production stands at merely 4 tons, while the national consumption requirement is estimated at 94,761 tons. In Punjab alone, the demand for ginger is 50,103 tons.



Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics

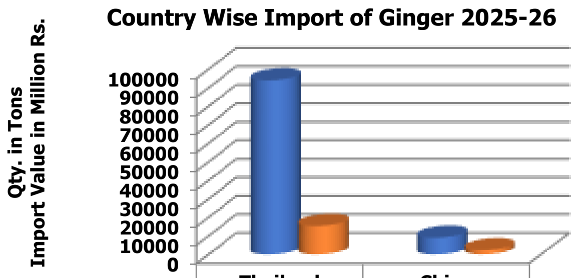
Import Insights

- Throughout 2024–25, total ginger imports reached 94,761 tons, at a cost of Rs. 16,707 million. During the year 2025–26 (July–April), import volumes amounted to 1,02,955 tons, with an expenditure of Rs. 17,577 million, with Thailand and China as the main suppliers.
- In 2025–26 (July–April), imports from Thailand totaled 93,963 tons, costing Rs. 15,277 million, while ginger imports from China stood at 8,993 tons, valued at Rs. 2,300 million.



	2021-22	2022-23	2023-24	2024-25	2025-26*
Qty.	68026	92084	81237	94761	102955
Import Value	16075	12024	14217	16707	17577

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

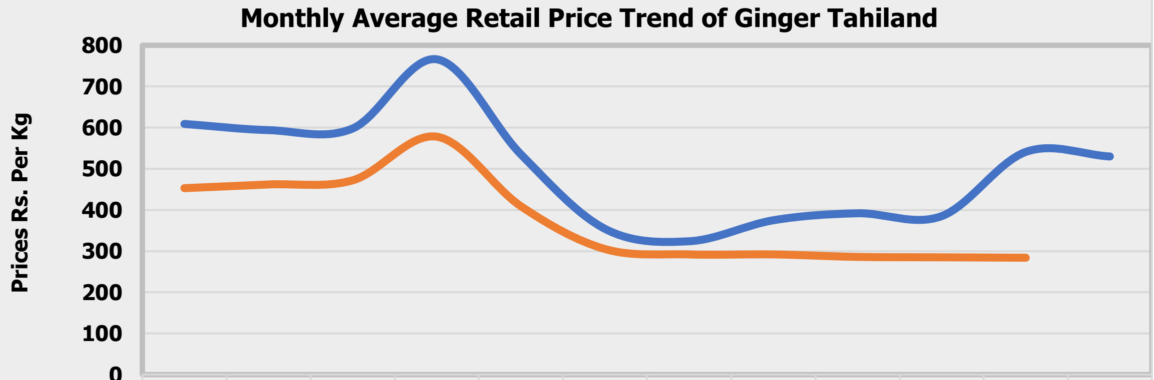


	Thailand	China
Qty.	93963	8993
Import Value	15277	2300

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

Market Prices

- Due to steady import of ginger from Thailand, both its supply and price situation remain quite stable in local markets. In May 2026, the average monthly retail price of Thai ginger was recorded at Rs. 284 per kilogram. The trend lines for monthly average retail prices of Thai ginger for the current year and the previous year are presented below:



	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2024-25	609	594	598	766	535	354	324	375	392	385	541	530
2025-26	453	462	472	578	409	305	292	292	286	285	284	

SUPPLY MANAGEMENT ADVISORY

Assessment

Since domestic ginger production is negligible, local consumption needs are met through imports from Thailand and China. At present, imports from Thailand are arriving smoothly and steadily, keeping both supply and prices of ginger stable in local markets.

Forecast

The ginger production season in Thailand is nearing its end, which could lead to slight supply shortages and a resulting increase in ginger prices in local markets.

Advisory

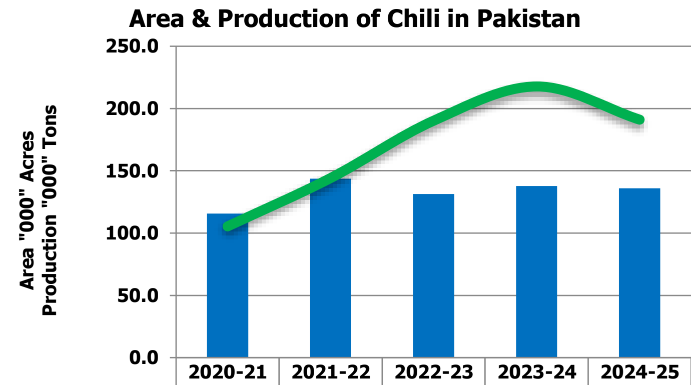
- EADAs (E&M) and Secretaries Market Committee should closely monitor the supply and price situation of ginger, ensuring an uninterrupted flow of the commodity into Agricultural Produce Markets with the assistance of importers and commission agents.
- To maintain consistent availability and stabilize prices throughout the year, the processing of ginger into paste should be actively encouraged.
- Agriculture Department should conduct result oriented research focused on domestic ginger production in order to reduce reliance on foreign imports and ease the resulting financial burden on the economy.

6. CHILLIES

NATIONAL OVERVIEW

Domestic Area & Production

- Over the past three years, the area for chili cultivation in Pakistan has remained steady. Although domestic production rose consistently from year 2020–21 to year 2023–24, a slight decline was recorded in year 2024–25.
- In year 2024–25, the cultivated area stood at 136,100 acres, continuing the stable trend observed in previous years. Domestic chili production totaled 191,100 tons, reflecting a 12.21% drop compared to the previous year's production.

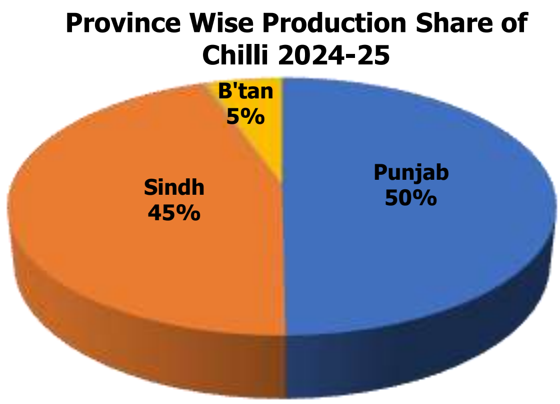


	2020-21	2021-22	2022-23	2023-24	2024-25
Area	115.7	143.7	131.4	137.9	136.1
Production	105.4	144.2	190.2	217.7	191.1

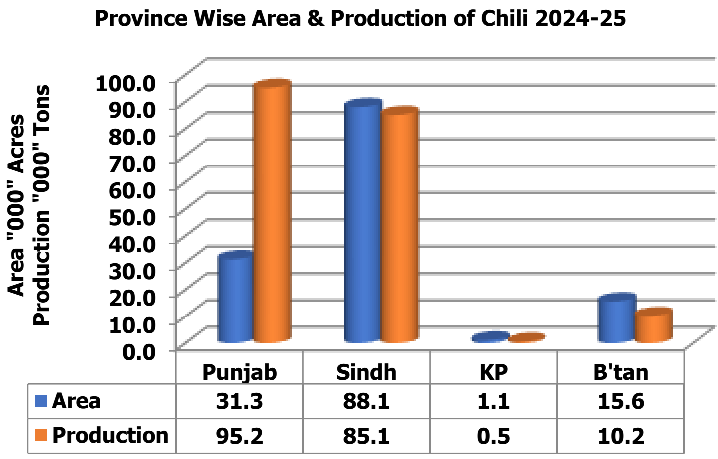
Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Province wise Area & Production

- Punjab holds a leading role in national chili production, accounting for 50% of the country's total production. Sindh follows closely with a 45% share, while Balochistan makes up the remaining 5%. Chili production in Khyber Pakhtunkhwa, by contrast, is almost negligible.



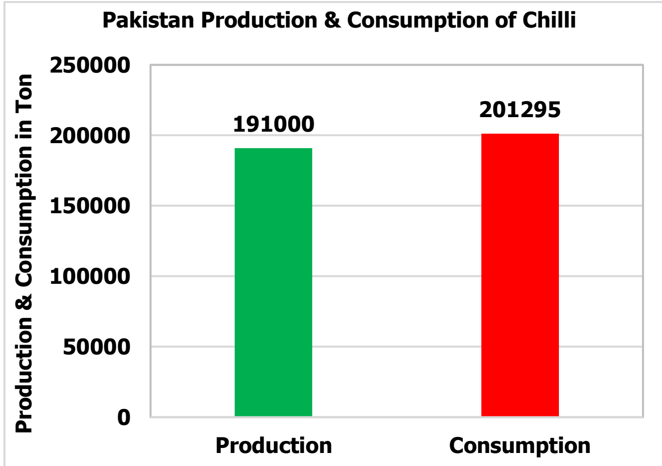
- In 2024–25, Punjab stood as the top chili-producing province, with 95,200 tons harvested from 31,300 acres. Sindh came in second, producing 85,100 tons across 88,100 acres.
- Meanwhile, chili production in Balochistan and Khyber Pakhtunkhwa remained very low, recorded at 10,200 tons and 500 tons, respectively.



Source:Agricultural Statistics of Pakistan

Domestic Production & Consumption:

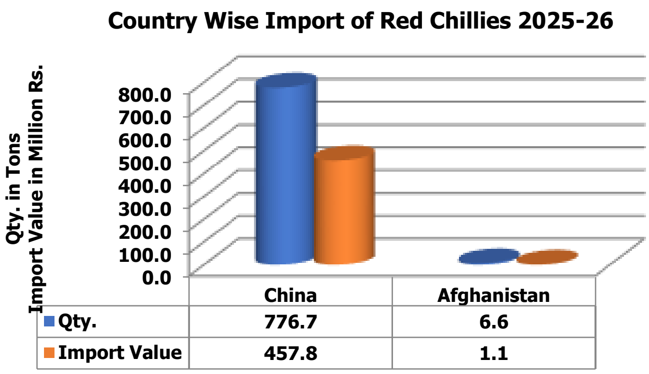
- During year 2024-25, domestic chili production amounted to 1,91,000 tons, which remained below the consumption requirement of 201,295 tons, resulting in a deficit of 10,295 tons.



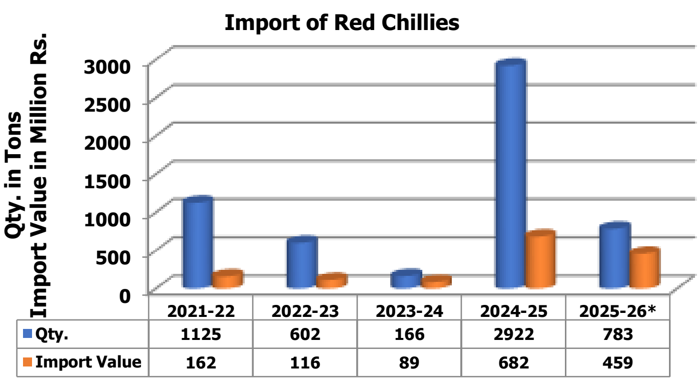
Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Import Insights

- In 2024–25, Pakistan imported 2,922 tons of red chili, at a cost of Rs. 682 million. During 2025–26 (July–April), imports reached 783 tons, with an associated expenditure of Rs. 459 million.
- China remains Pakistan's primary source of red chili imports. In 2025–26 (July–April), imports from China totaled 777 tons, costing Rs. 458 million, while only 6.6 tons were imported from Afghanistan at a cost of Rs. 1.1 million.



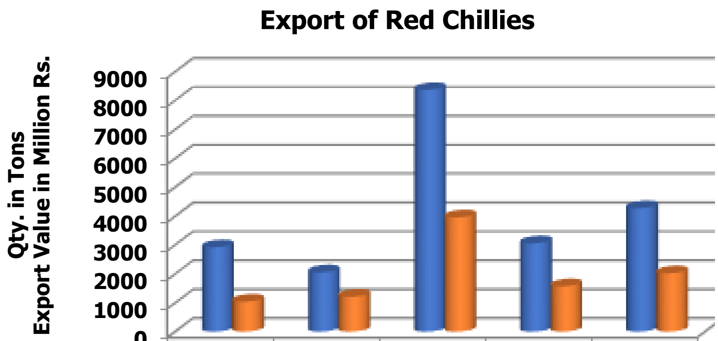
**=Import during July 2025 to April 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)



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

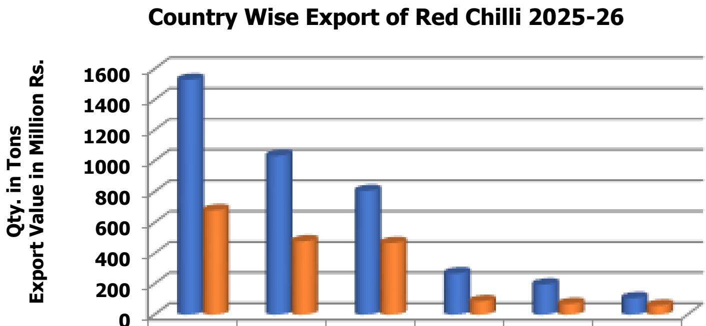
Export Insights

- Pakistan’s red chili exports have consistently exceeded imports in both quantity and value. In 2024–25, export volumes reached 3,051 tons, generating Rs. 1,574 million in revenue. During 2025–26 (July–April), red chili exports totaled 4,273 tons, yielding foreign exchange earnings of Rs. 2,021 million.
- The main destinations for Pakistan’s red chili exports are China, the United Arab Emirates, Saudi Arabia, Senegal, Iraq, and Oman.



	2021-22	2022-23	2023-24	2024-25	2025-26*
Qty.	2913	2053	8367	3051	4273
Export Value	1046	1215	3960	1574	2021

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



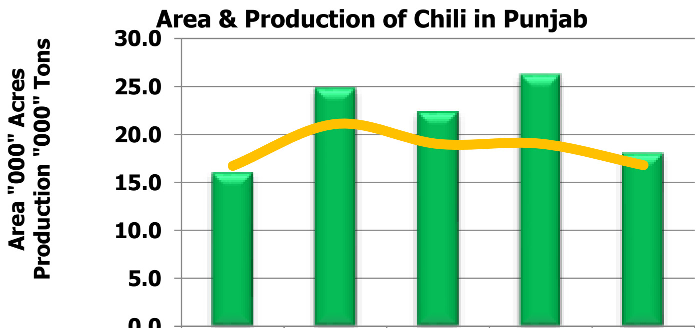
	China	UAE	Saudi Arabia	Senegal	Iraq	Oman
Qty.	1529	1033	805	267	195	106
Export Value	679	478	467	86	69	58

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

PROVINCIAL OVERVIEW

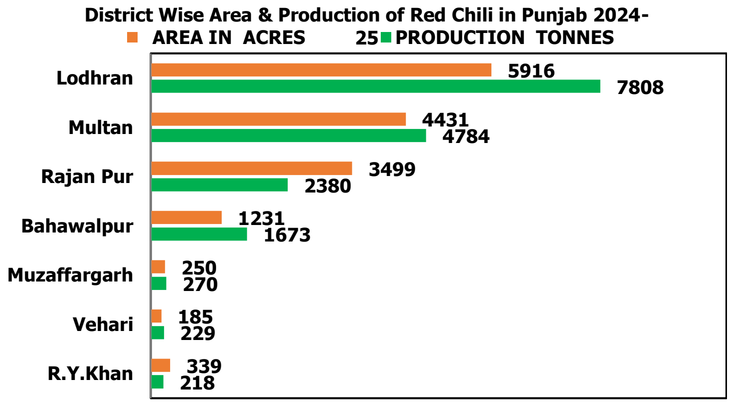
Area & Production

- Over the past five years, chili cultivation and production in Punjab have experienced fluctuations. In year 2024–25, the area dedicated to chili farming dropped to 16,800 acres, an 11.75% decrease from the previous year. Likewise, chili production in the province fell to 18,000 tons, marking a 31.48% decline compared to the prior year.
- The primary chili-producing districts within Punjab are Lodhran, Multan, Rajanpur, Bahawalpur, Muzaffargarh, Vehari, and Rahim Yar Khan.



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

Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

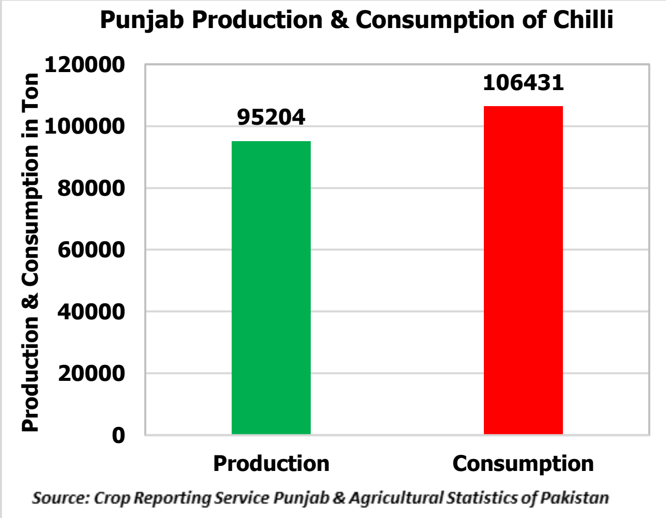


Source: Crop Reporting Service Punjab

- Lodhran emerged as the top red chili-producing district, with 7,808 tons harvested from 5,916 acres. Multan ranked second, producing 4,784 tons, while Rajanpur came in third with 2,380 tons.

Provincial Production & Consumption:

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



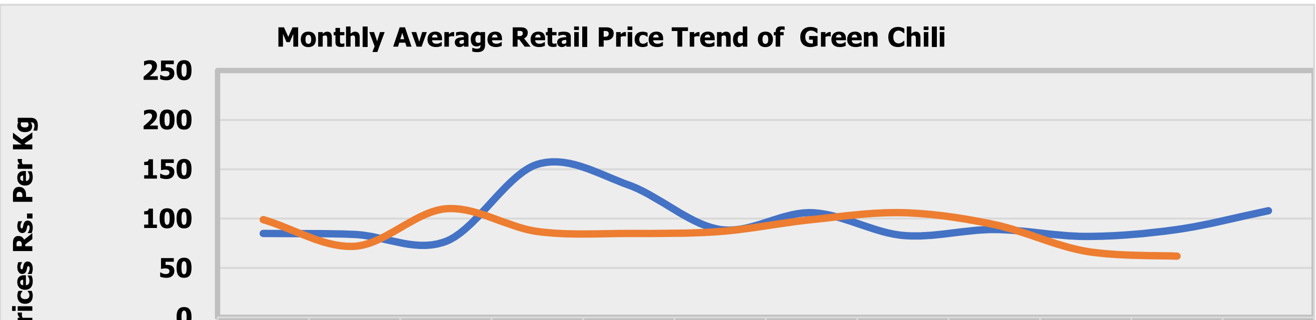
Supply Cycle

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

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

Market Prices

- Green chili supplies are currently available locally, causing prices to show a declining trend in domestic markets. In May, the average retail price of green chilies in Punjab stood at Rs. 62 per kilogram. The graphical trend of monthly average retail prices of green chilies in Punjab is presented below:



	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2024-25	85	84	77	155	134	89	106	83	89	82	89	108
2025-26	99	72	110	87	85	87	99	106	94	67	62	

SUPPLY MANAGEMENT ADVISORY

Assessment

Punjab contributes 50% of the country's domestic chili production. With local supply available, both the supply and price situation for green chilies is showing a declining trend in domestic markets.

Forecast

As local supplies are available, the supply and price situation for green chilies is expected to remain normal in domestic markets.

Advisory

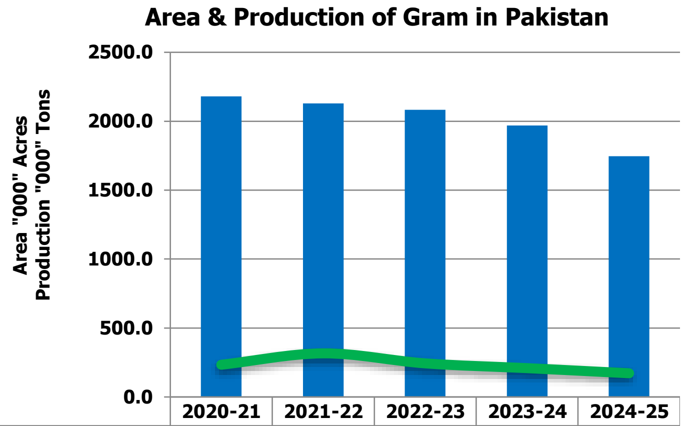
- With the local production season currently underway, EADAs (E&M) and Secretaries Market Committee should regularly monitor the auction proceedings of green chilies in Agricultural Produce Markets and ensure that prices are fixed in a transparent manner.
- Public awareness initiatives promoting kitchen gardening of chilies should be encouraged to reduce the strain on market supplies.
- The Agriculture Department should accelerate research efforts focused on developing and promoting high-yielding, climate-resilient, and off-season seed varieties, in order to enhance self-sufficiency and reduce inter-provincial dependence.

7. GRAM (Chickpea)

NATIONAL OVERVIEW

Domestic Area & Production:

- The area of land devoted to gram cultivation nationwide has gradually shrunk, leading to a corresponding decline in domestic production that falls well below the country's consumption requirements.
- In 2024–25, gram was planted on 1,747,200 acres, representing an 11.2% reduction in acreage compared to the previous year.
- Consequently, domestic gram production fell to 171,941 tons in 2024–25, a 17.7% drop from the production levels of the prior year.

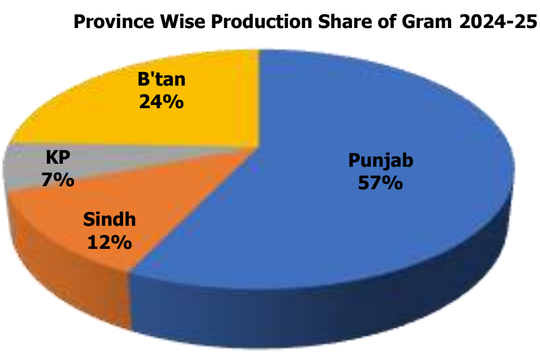


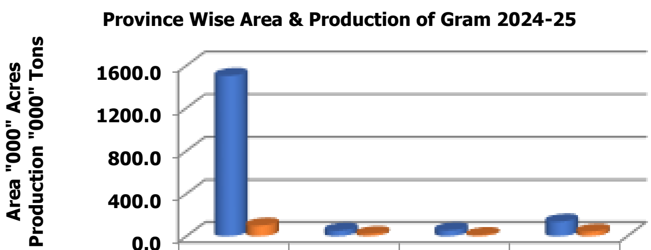
	2020-21	2021-22	2022-23	2023-24	2024-25
Area	2181.2	2129.3	2082.4	1969.7	1747.2
Production	233.9	316.2	243.6	209.0	171.9

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

Province wise Area & Production:

- Punjab remains the country's top gram-producing region, accounting for 57% of total production. Balochistan follows with a 24% share, while Sindh and Khyber Pakhtunkhwa contribute 12% and 7%, respectively.
- In year 2024–25, Punjab produced 98,500 tons of gram on 1,505,000 acres. Over the same period, production in Balochistan, Sindh, and Khyber Pakhtunkhwa stood at 42,000 tons, 20,700 tons, and 11,300 tons, respectively.



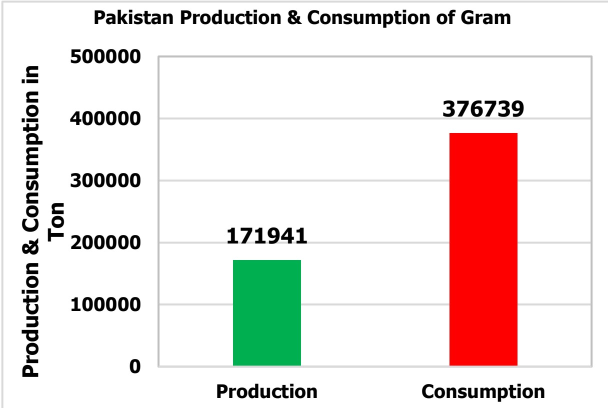


	Punjab	Sindh	KP	B'tan
Area	1505.0	52.1	54.5	135.6
Production	98.5	20.7	11.3	42.0

Source:Aaricultural Statistics of Pakistan

Domestic Production and Consumption:

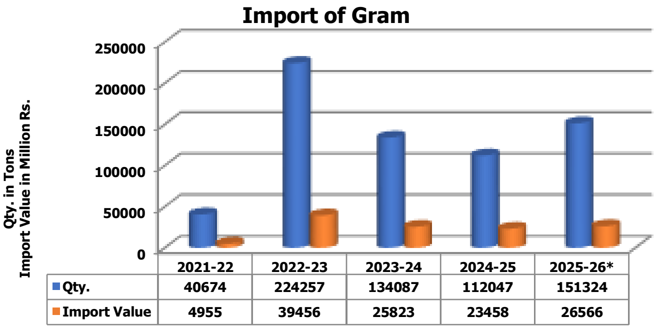
- Pakistan's insufficient domestic gram production necessitates regular imports to meet national consumption requirements. In year 2024-25, domestic production totalled 171,941 tons, falling well short of the estimated consumption demand of 3,76,739 tons, resulting in a significant supply deficit of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



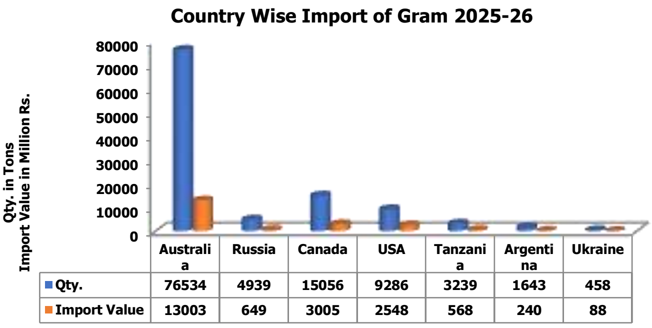
Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Import Insights:

- In 2024–25, Pakistan imported 112,047 tons of gram, at a total cost of Rs. 23,458 million. This amount was exceeded during the 2025–26 period (July–April), when imports reached 1,51,324 tons, with an expenditure of Rs. 26,566 million.
- The main sources of Pakistan's gram imports are Australia, Russia, Canada, the USA, Tanzania, Argentina, and Ukraine.



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

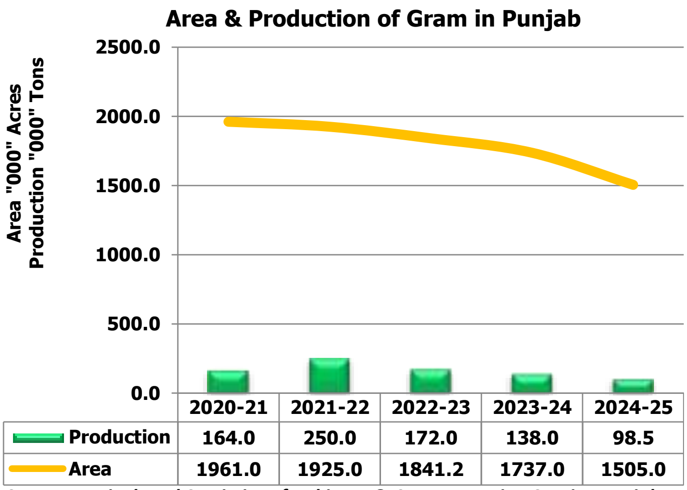


**=Import during July 2025 to April 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

PROVINCIAL OVERVIEW

Area & Production:

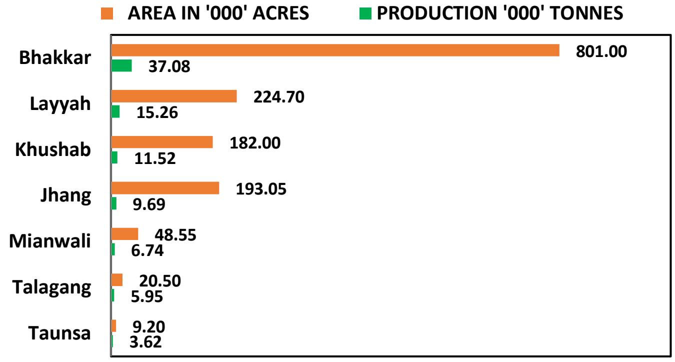
- Over the past four years, gram cultivation and production in Punjab have shown a consistent downward trend.
- In year 2024–25, the area sown with gram stood at 1,505,000 acres, a 13.35% decrease from the previous year. Likewise, gram production in the province fell to 98,500 tons, reflecting a 28.6% drop compared to the prior year's production.



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

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

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

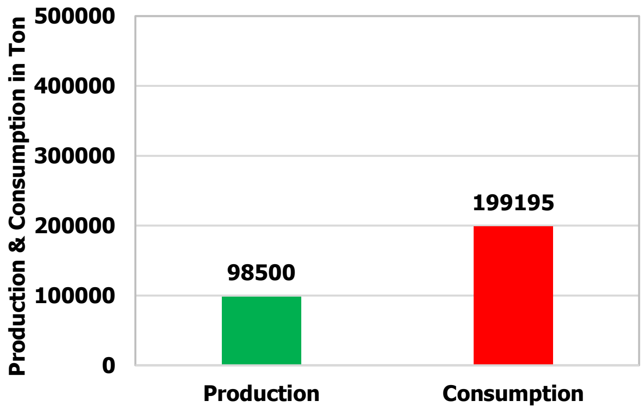


Source: Crop Reporting Service Punjab

Provincial Production & Consumption:

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

Punjab Production & Consumption of Gram

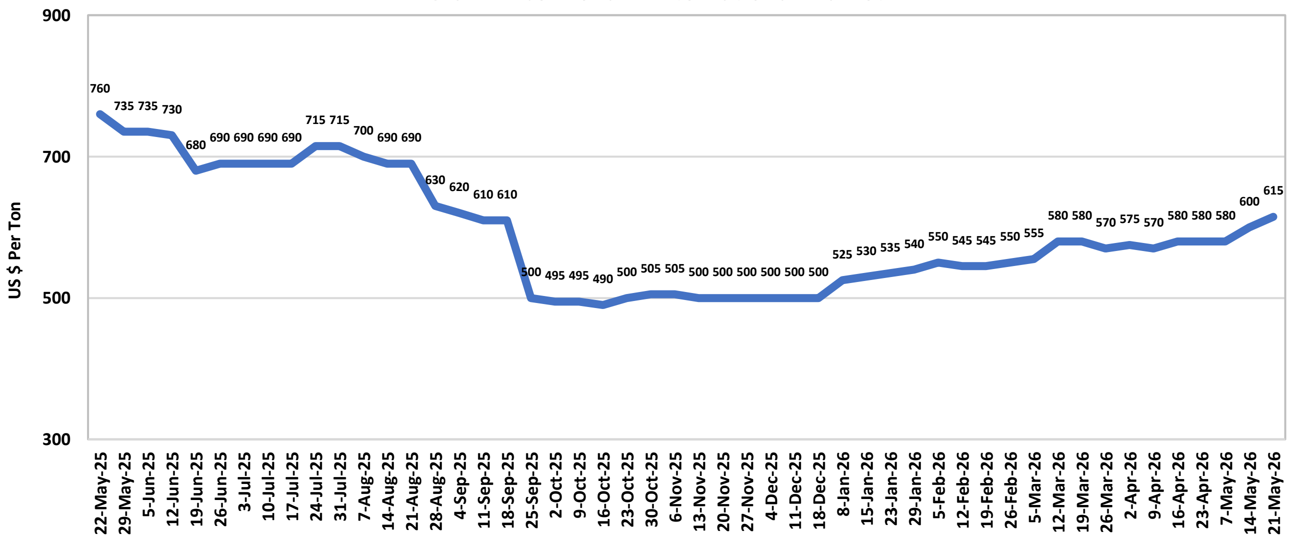


Source: Crop Reporting Service Punjab & Agricultural Statistics of Pakistan

International Market Trends

- International prices of gram have slightly increased and current international price of gram is USD 615/ton. The weekly price trends reported by the Global Pulse Confederation, is outlined below:

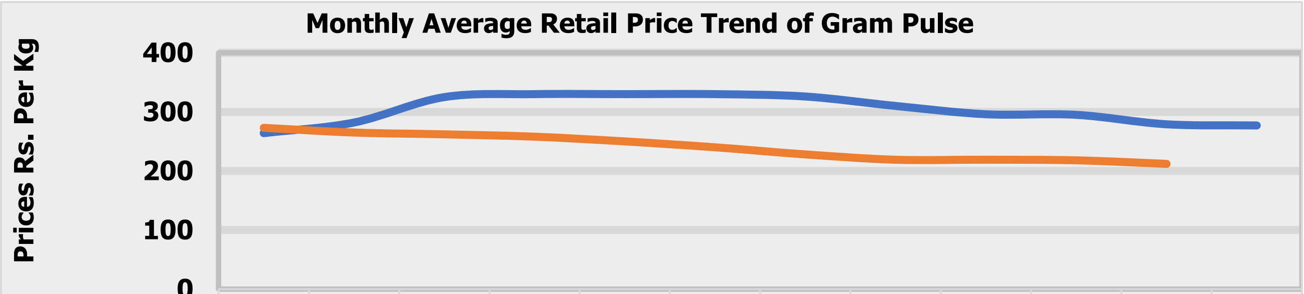
Gram Price Trend in International Market



Source: Global Pulses Confederation

Local Market Price:

- As a result of steady imports, local gram prices are showing a slightly declining trend. Furthermore, due to availability of local crop, supply situation of gram has improved in local markets. In Punjab, the average monthly retail price of gram pulse recorded in May 2026 was Rs. 212, which is significantly lower than the price observed during the same period last year.



	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2024-25	264	282	325	330	330	330	326	310	296	295	279	277
2025-26	273	265	262	258	250	240	228	219	219	218	212	

SUPPLY MANAGEMENT ADVISORY

Assessment

Local crop is available. This year local production is expected to be higher than the last year. Thus, supply & price situation of gram is stable in local markets.

Forecast

Due to availability of local crop, gram prices are expected to stay on the lower side in domestic markets. Additionally, a healthy gram crop is anticipated in India this year, which will improve supply in international markets and resultantly global prices are likely to remain on lower side.

Advisory

- As local gram crop is available, thus EADAs (E&M) and Secretaries Market Committee in key producing districts such as Bhakkar, Khushab, Layyah, and Mianwali should coordinate with local commission agents to ensure the smooth supply of the crop.
- District Administrations should account for the availability of the local crop while fixing gram prices during District Price Control Committee (DPCC) meetings.

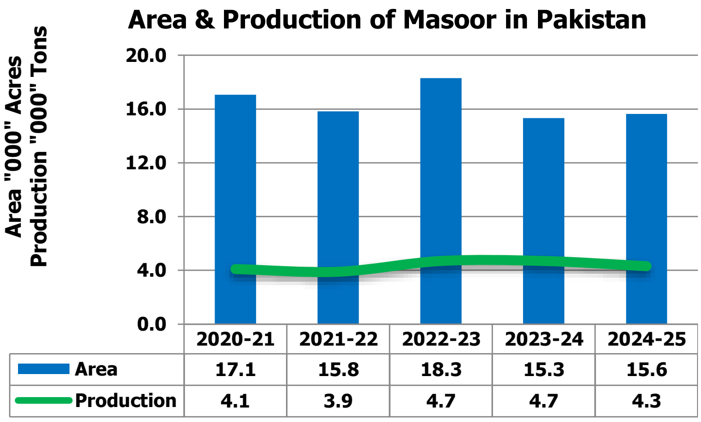
- EADA (E&M) and Secretaries Market Committee should also conduct stock taking exercise on regular basis.
- Price Control Magistrates should carry out regular inspections of retailers to ensure strict enforcement of notified prices.

8. LENTIL (MASOOR)

NATIONAL OVERVIEW

Domestic Area & Production:

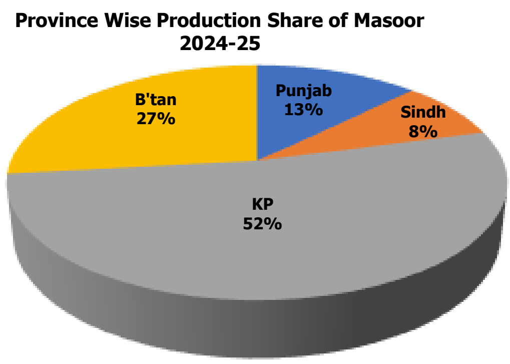
- Pakistan produces only a very limited quantity of masoor (lentil), making it heavily dependent on imports to meet domestic demand. Graphical data shows that both production and cultivated area have remained at very low levels and have been unstable over the past five years.
- In year 2024–25, the area under masoor cultivation expanded slightly to 15,600 acres, a 1.96% increase from the previous year, though it remained 8.77% below the area recorded in 2020–21. During the same period, masoor production fell to 4,300 tons, an 8.5% decline compared to the prior year.



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

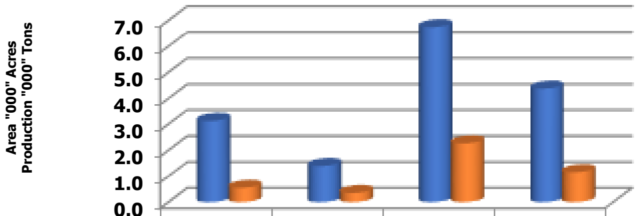
Province wise Area & Production:

- Khyber Pakhtunkhwa (KP) leads the country in masoor production, accounting for 52% of the total domestic production. Balochistan follows with a 27% share, while Punjab contributes 13%, and Sindh makes up the remaining 8%.



- In year 2024–25, masoor production in Khyber Pakhtunkhwa (KP) totaled 2,300 tons, harvested from 6,700 acres. Balochistan ranked second with 1,200 tons, followed by Punjab at 500 tons and Sindh at 300 tons

Province Wise Area & Production of Masoor 2024-25

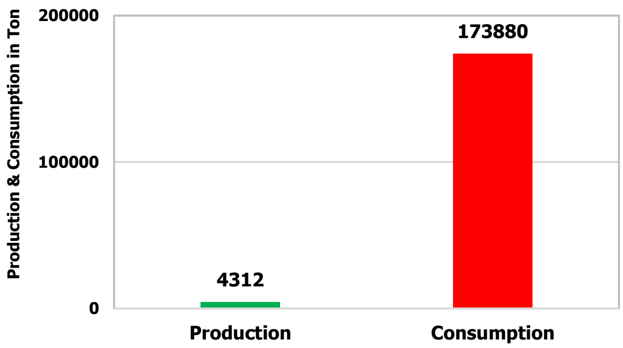


	Punjab	Sindh	KP	B'tan
Area	3.1	1.4	6.7	4.4
Production	0.5	0.3	2.3	1.2

Domestic Production & Consumption

- In year 2024–25, there was a significant gap between domestic masoor production and consumption demand. Domestic production stood at just 4,312 tons, while national consumption requirements reached 173,880 tons, creating a large deficit of 169,568 tons..

Pakistan Production & Consumption of Masoor

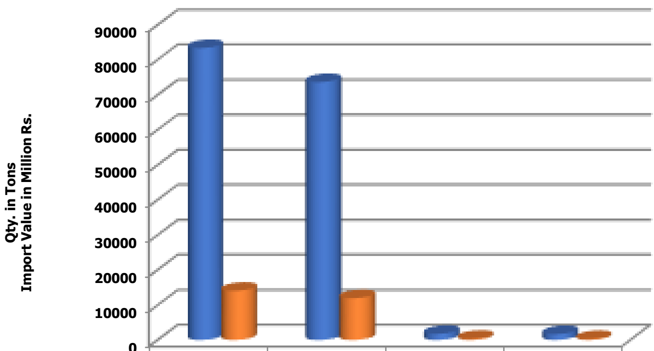


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Import Insights

- To fill the gap between domestic supply and consumption needs, Pakistan imported 138,991 tons of masoor in 2024–25 at a cost of Rs. 27,025 million, marking a decrease in both volume and value from the previous year. In 2025–26 (July–April), masoor imports rose to 161,652 tons, with an expenditure of Rs. 26,801 million.
- Masoor imports come mainly from Canada, Australia, Ukraine, and Afghanistan. Canada and Australia account for the largest share of import volumes, while contributions from Ukraine and Afghanistan remain relatively small.
- During 2025–26 (July–April), imports from Canada totaled 83,287 tons at a cost of Rs. 14,067 million, while Australia supplied 73,639 tons valued at Rs. 11,958 million.

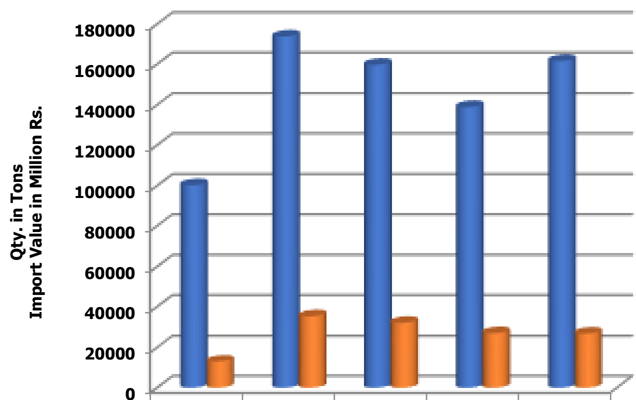
Country Wise Import of Masoor 2025-26



	Canada	Australia	Ukraine	Russia
Qty.	83287	73639	1717	1641
Import Value	14067	11958	297	243

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

Import of Masoor



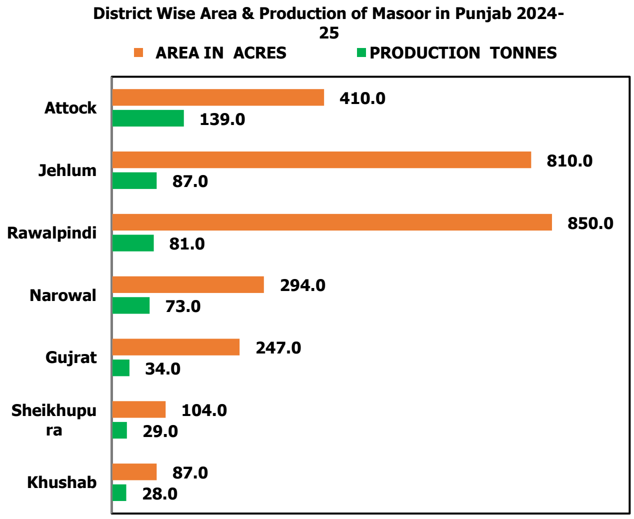
	2021-22	2022-23	2023-24	2024-25	2025-26*
Qty.	100297	173922	159764	138991	161652
Import Value	12964	35351	32129	27025	26801

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

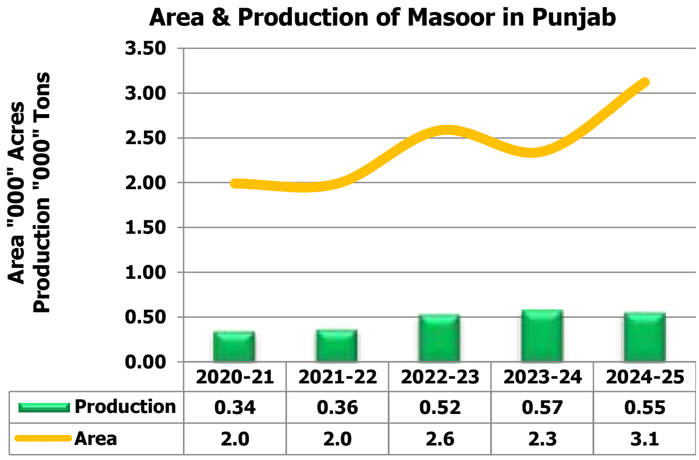
PROVINCIAL OVERVIEW

Area & Production:

- Although both the area under cultivation and production of masoor in Punjab have gradually increased over the past five years, production remains modest and continues to fall far short of provincial consumption requirements.
- In year 2024–25, masoor production in Punjab fell to 546 tons, a 3.5% decrease from the previous year, while the cultivated area expanded to 3,100 acres, reflecting a 34.7% increase over the prior year.
- Masoor cultivation in Punjab is primarily concentrated in Attock, Jhelum, Rawalpindi, Narowal, Gujrat, Sheikhupura, and Khushab, with Attock leading production at 139 tons harvested from 410 acres.



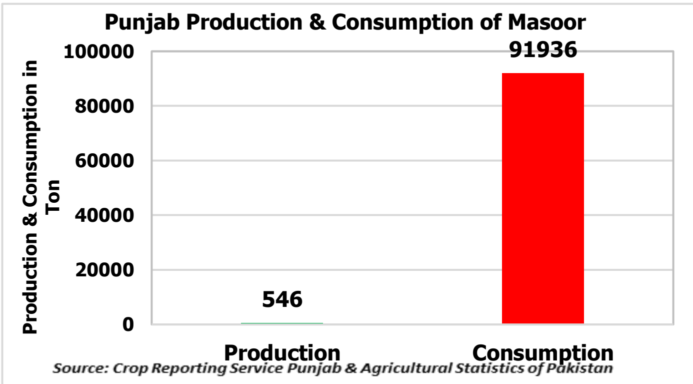
Source: Crop Reporting Service Punjab



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

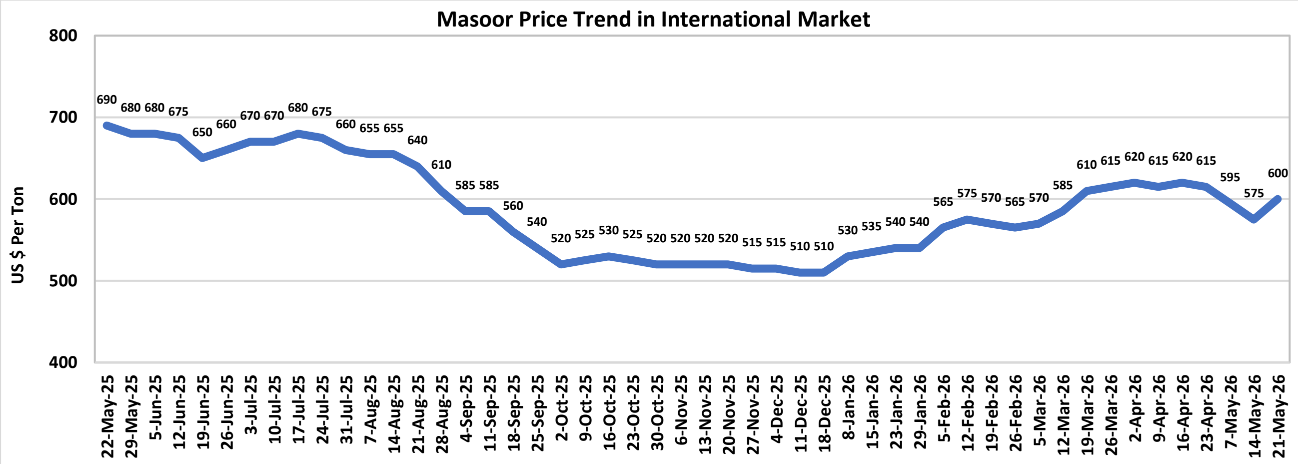
Provincial Production & Consumption:

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



International Market Trend:

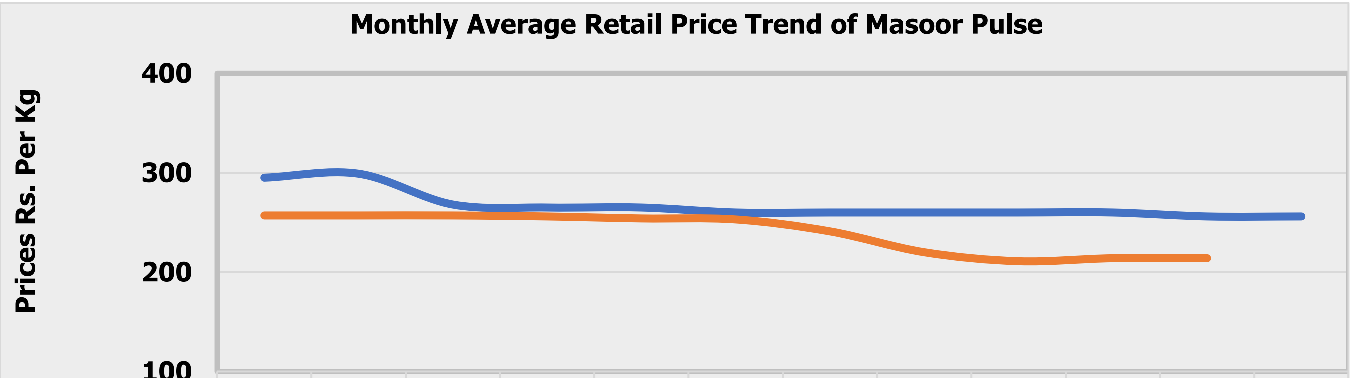
International prices of masoor are showing slightly increasing trend and current international prices of maoor are USD 600/ton. The weekly trend in global masoor prices, as reported by the Global Pulse Confederation, is illustrated below:



Source: Global Pulses Confederation

Local Market Price:

- Masoor imports have been smooth, resulting in a stable supply and price situation in domestic markets. In Punjab, the average monthly retail price of masoor recorded during May was Rs. 214 per kilogram.



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

SUPPLY MANAGEMENT ADVISORY

Assessment

Domestic masoor production is negligible, making imports essential to meet local consumption needs. Imports are smoothly in progress, thus supply & price situation is stable in local markets. Additionally, the local crop is also available but in less quantum. International masoor prices are showing a slight upward trend, which could lead to an increase in local prices as well.

Forecast

International masoor prices are trending slightly upward, which may also push up prices in local markets. Although the local crop is available, but its impact on the market is negligible due to low production volumes.

Advisory

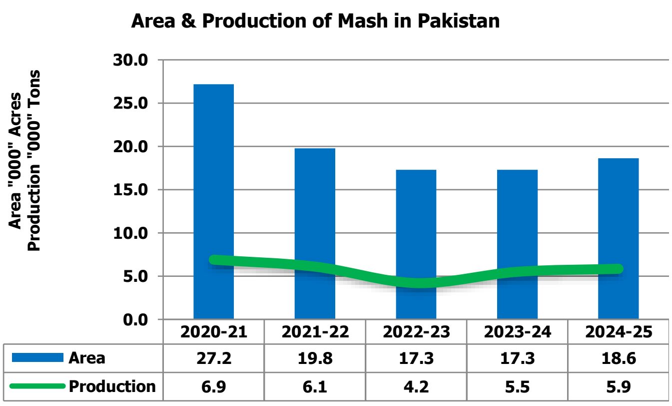
- The District Administration, in coordination with the relevant EADAs (E&M) and Secretaries Market Committee, should hold regular meetings with commission agents, importers, and dealers to assess the current supply situation and take timely measures to maintain stable supply and prices for masoor.
- Stock position reports should be consistently monitored and updated to ensure a steady supply of masoor.
- Price Control Magistrates should regularly inspect retailers and enforce strict measures to ensure that notified prices are implemented within the markets.

9. MASH

NATIONALOVERVIEW

Domestic Area & Production:

- With domestic production of mash being extremely limited, Pakistan is forced to depend on imports for nearly 94% of its total consumption needs.
- A gradual increase in both cultivated area and production has been seen over the past three years. In year 2024–25, mash cultivation expanded to 18,600 acres, a 7.51% rise compared to the previous year.



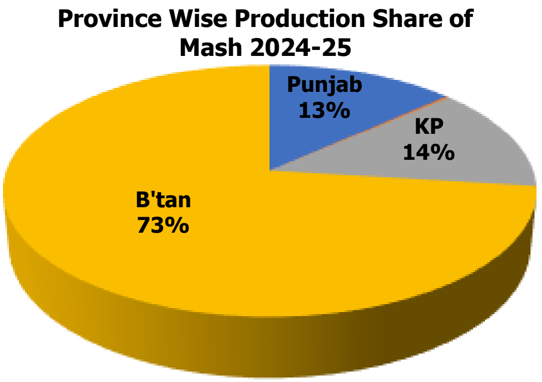
	2020-21	2021-22	2022-23	2023-24	2024-25
Area	27.2	19.8	17.3	17.3	18.6
Production	6.9	6.1	4.2	5.5	5.9

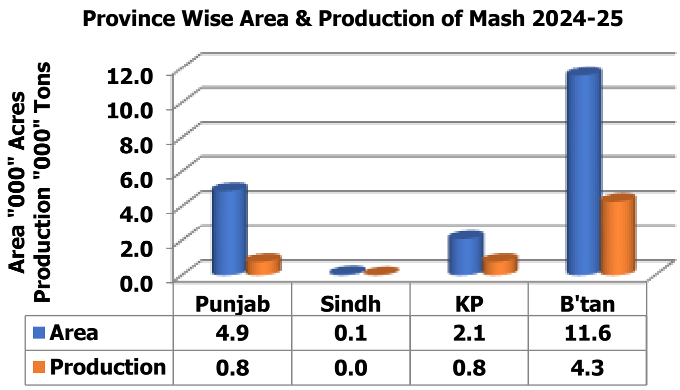
Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

- Similarly, national mash production increased to 5,850 tons, showing a 6.36% rise from the 5,500 tons recorded the previous year.

Province wise Area & Production:

- Balochistan holds the dominant share of national mash production, accounting for 73% of the total production. Khyber Pakhtunkhwa follows with a 14% share, and Punjab ranks third at 13%, while Sindh reports no mash production at all.
- In year 2024–25, mash production in Balochistan reached 4,300 tons, compared to 800 tons in Khyber Pakhtunkhwa and 780 tons in Punjab. Sindh recorded no production.

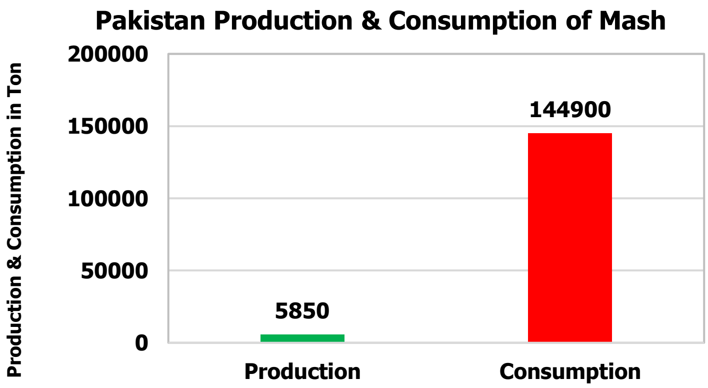




Source:Agricultural Statistics of Pakistan

Domestic Production & Consumption:

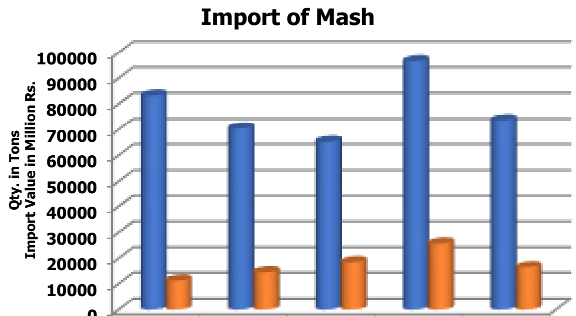
- In 2024–25, domestic mash production amounted to only 5,850 tons, while national consumption demand stood at 144,900 tons, creating a major supply shortfall of 139,050 tons.



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

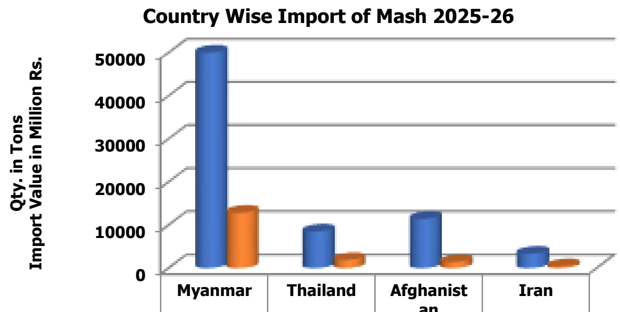
Import Insights:

- Due to limited domestic production, Pakistan continues to depend heavily on mash imports to meet national consumption needs. In 2024–25, mash imports totaled 96,565 tons, costing Rs. 25,701 million. During 2025–26 (July–April), import volumes reached 73,669 tons, with an expenditure of Rs. 16,483 million.
- Most mash imports come from Myanmar, Afghanistan, and Thailand, with Myanmar and Afghanistan being the main suppliers. In year 2025–26 (July–April), imports from Myanmar totaled 42,750 tons, from Afghanistan 11,395 tons, from Thailand 5,900 tons, while imports from Iran remained minimal at 2,122 tons.



	2021-22	2022-23	2023-24	2024-25	2025-26*
Qty.	83260	70437	65245	96565	73669
Import Value	11231	14420	18559	25701	16483

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



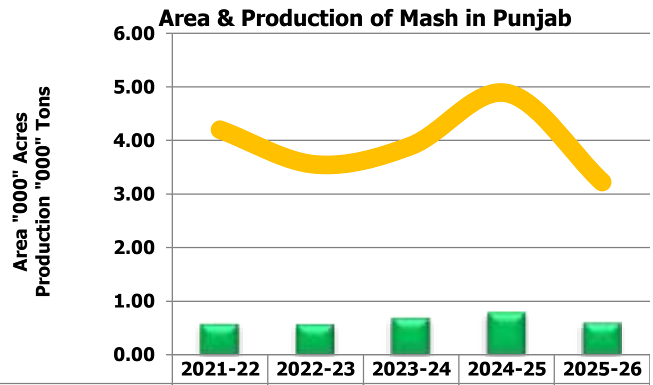
	Myanmar	Thailand	Afghanistan	Iran
Qty.	50425	8475	11395	3374
Import Value	12796	1902	1380	404

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

PROVINCIAL OVERVIEW

Area & Production:

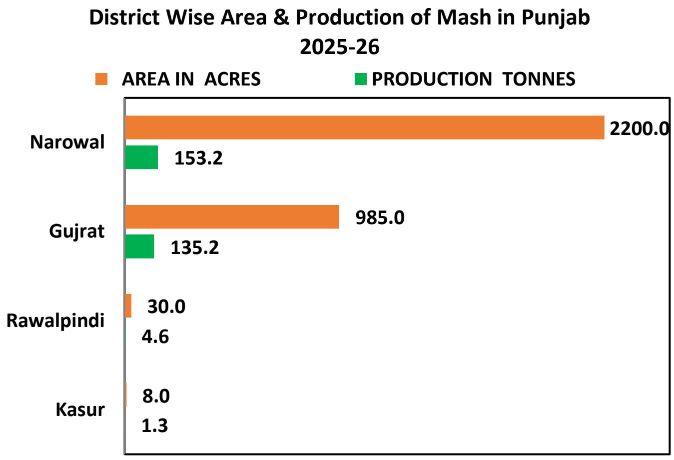
- During period year 2022-23 to year 2024-25, cultivated area and production of mash in Punjab have shown consistent increasing trend.
- However, during year 2025-26 both cultivated area and production of mash in punjab have declined over the last year.
- In year 2025–26, provincial mash production declined to 590 tons, showing a 24.3% decrease from the previous year, similarly the cultivated area reduced to 3200 acres, reflecting a 34.6% decline over last year.



	2021-22	2022-23	2023-24	2024-25	2025-26
Production	0.57	0.56	0.68	0.78	0.59
Area	4.2	3.6	3.9	4.9	3.2

Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

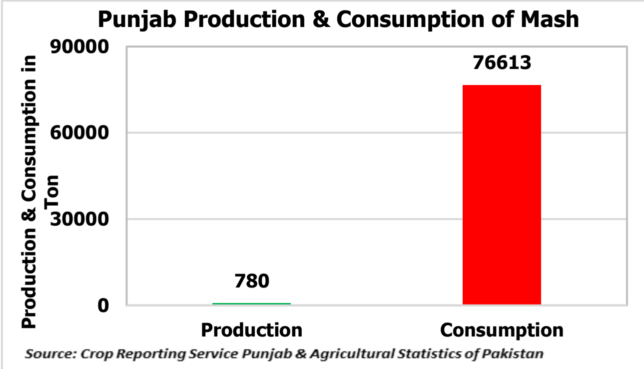
- Mash cultivation in Punjab is primarily cantered in Narowal, Gujrat, Rawalpindi & Kasur, with Narowal emerging as the top-producing district, producing 153.2 tons from 2200 acres.



Source: Crop Reporting Service Punjab

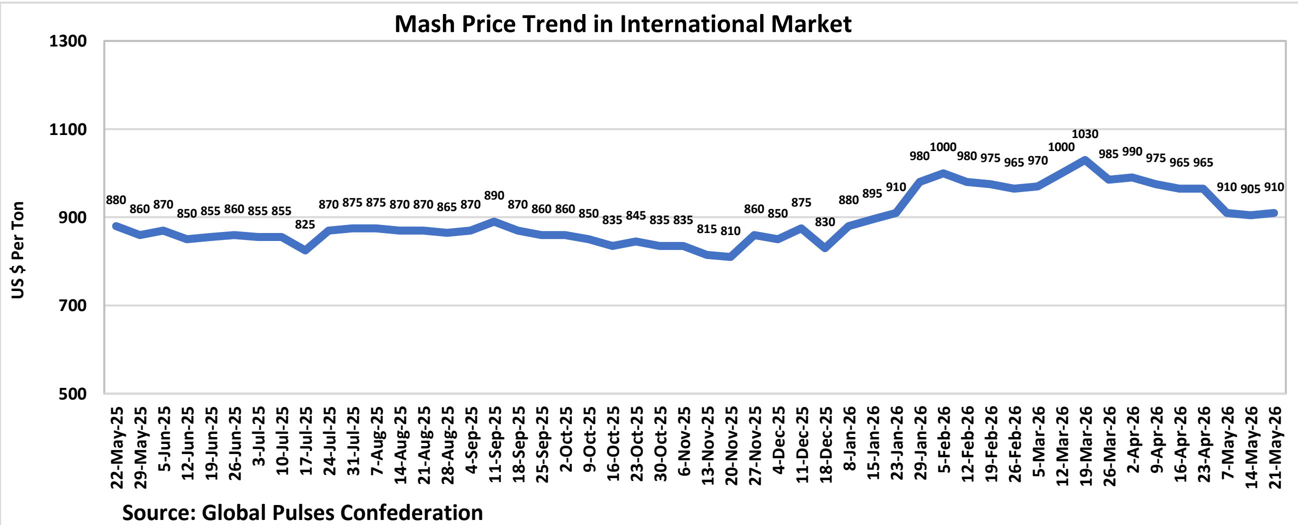
Provincial Production and Consumption:

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



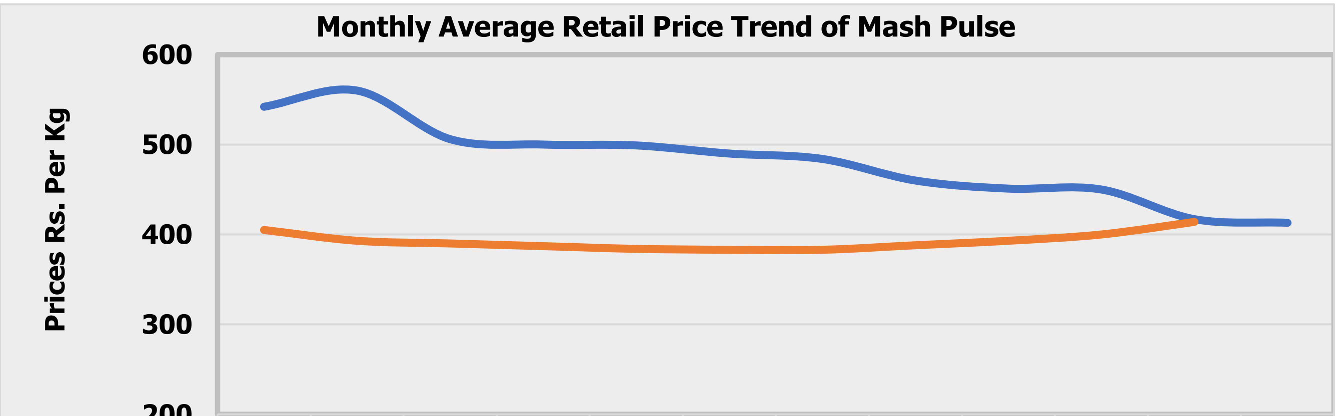
International Market Trend:

Due to availability of mash crop from Myanmar, international prices of mash are showing decreasing trend. Current international price of mash is USD 910/ton.



Local Market Price:

Local prices of mash are showing slightly increasing trend. Monthly average retail price of mash in Punjab is recorded at Rs.414/kg during month of May-2026.



	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2024-25	542	560	506	500	499	490	484	460	451	450	417	413
2025-26	405	393	390	387	384	383	383	388	393	400	414	

SUPPLY MANAGEMENT ADVISORY

Assessment

Due to negligible domestic production, import of mash is essential to meet local consumption needs. The import situation remains smooth, resulting in stable supply and prices in domestic markets. Additionally, mash from Myanmar is available in the international market, which is driving global prices downward, and this decline may also be reflected in local prices.

Forecast

International mash prices have begun to decline due to the arrival of the mash crop from Myanmar. With this drop in global prices, imports are likely to remain smooth, and a decrease in local prices may also be observed.

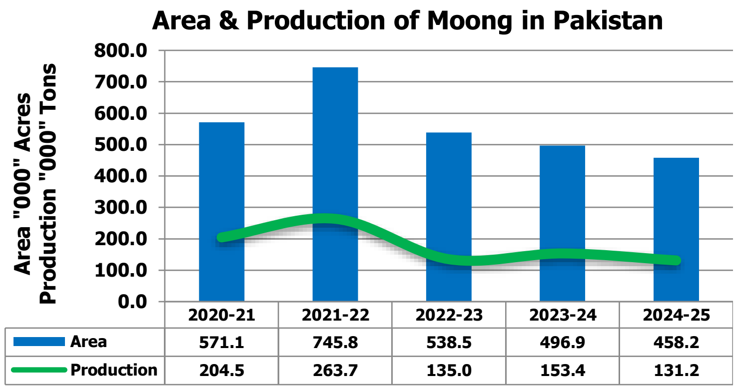
Advisory

- The District Administration, in coordination with the relevant EADAs (E&M) and Secretaries Market Committee, should take into account the falling international mash prices driven by Myanmar's production season when setting local prices during DPCC meetings.
- The District Administration should encourage importers and traders to maximize mash imports on account of its declining global prices.
- Stock positions must be updated regularly to enable timely actions that ensure stability in both mash supply and prices.
- Price Control Magistrates (PCMs) should take strict action against retailers found overcharging and ensure the rigorous enforcement of notified retail prices. A gap between open market rates and notified retail prices has been observed and should be minimized.

10. MOONG

Domestic Area & Production

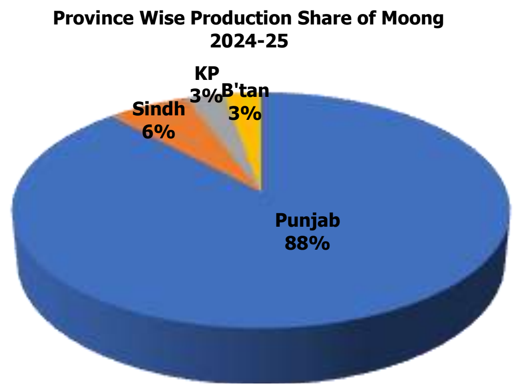
- Domestic moong cultivation has shown a continuous downward trend over the past four years, and production during this period has also remained unstable, with an overall decline.
- In year 2024–25, the area under moong cultivation in the country stood at 458,200 acres, a 7.78% decrease compared to the previous year.
- Similarly, domestic moong production amounted to 131,200 tons in 2024–25, reflecting a 14.47% drop from the previous year.



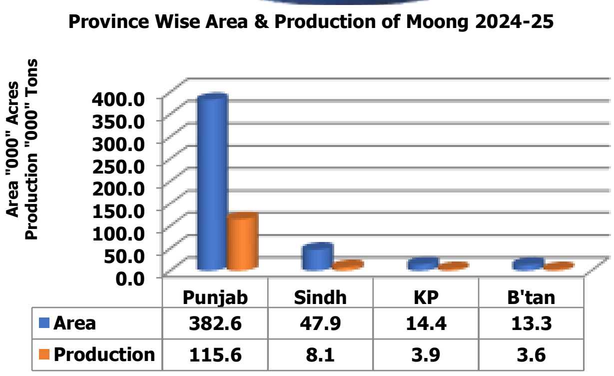
Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Province wise Area & Production:

- In year 2024–25, Punjab held the dominant share of domestic moong production, accounting for 88% of the national total. Sindh followed with a 6% share, while Balochistan and Khyber Pakhtunkhwa each contributed 3%.



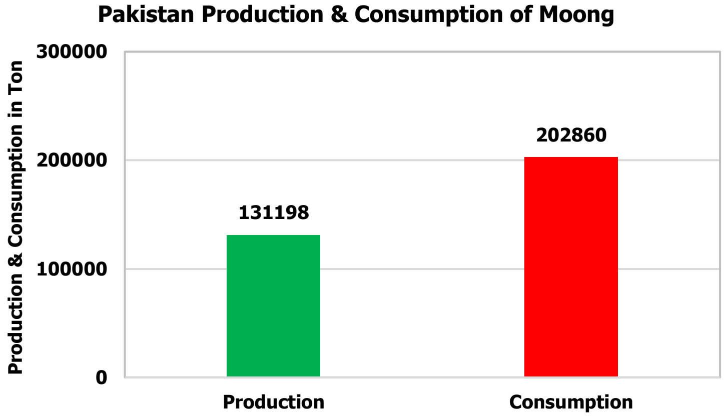
- In 2024–25, Punjab was the leading moong-producing province, with 115,600 tons grown on 382,600 acres.
- Sindh followed with 8,100 tons, Khyber Pakhtunkhwa produced 3,900 tons, and Balochistan recorded the lowest production at 3,600 tons.



Source:Agricultural Statistics of Pakistan

Domestic Production & Consumption:

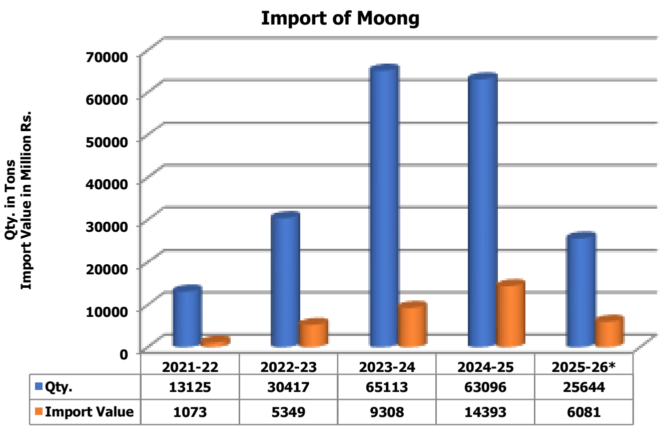
- During year 2024-25, Pakistan's domestic moong production reached 131,198 tons, falling short of the national consumption requirement of 202,860 tons and resulting in a supply deficit of 71,662 tons.



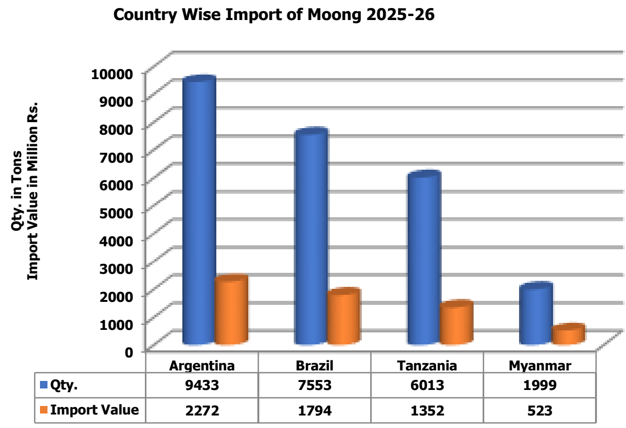
Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Import Insights:

- As a result of short supply, Pakistan remains dependent on imports to meet its domestic consumption requirements.
- In year 2024-25, Pakistan imported 63,096 tons of moong at a cost of Rs. 14,393 million. However, during year 2025-26 (July-April), imports reached 25,644 tons, at an expense of Rs. 6,081 million.
- Pakistan primarily sources moong imports from Argentina, Brazil, Tanzania, and Myanmar.



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

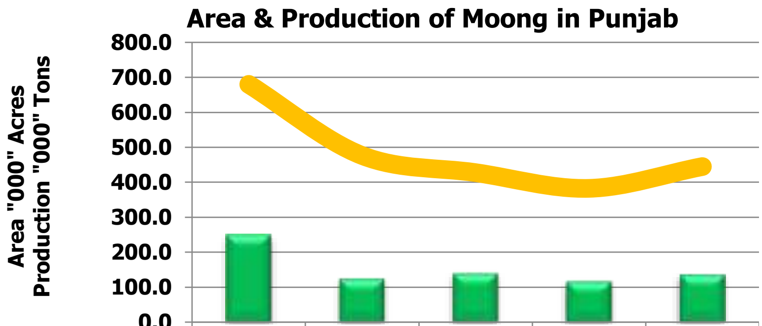


**=Import during July 2025 to April 2026*
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

PROVINCIAL OVERVIEW

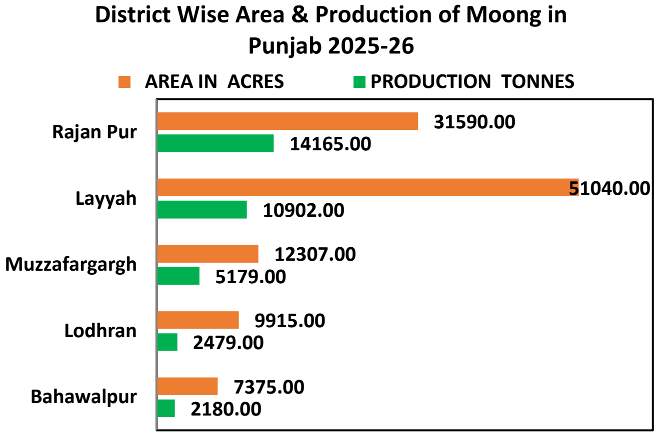
Area & Production:

- Over the past four years, the area under moong cultivation in Punjab has followed a declining trend, and production during this period has also remained unstable.
- In 2024–25, the moong-cultivated area in Punjab shrank to 382,600 acres, a 10.5% reduction from the previous year, while production stood at 115,600 tons, reflecting a 16.8% decrease compared to the prior year.
- The main moong-producing districts in Punjab are Mianwali, Bhakkar, Rajanpur, Layyah, Muzaffargarh, Bahawalpur, and Lodhran.



	2021-22	2022-23	2023-24	2024-25	2025-26
Production	249.8	123.8	139.0	115.6	134.9
Area	680.0	476.4	427.5	382.6	444.9

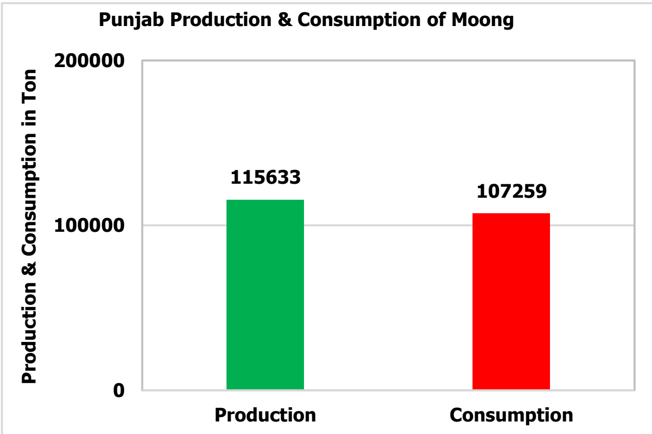
Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



Source: Crop Reporting Service Punjab

Provincial Production & Consumption:

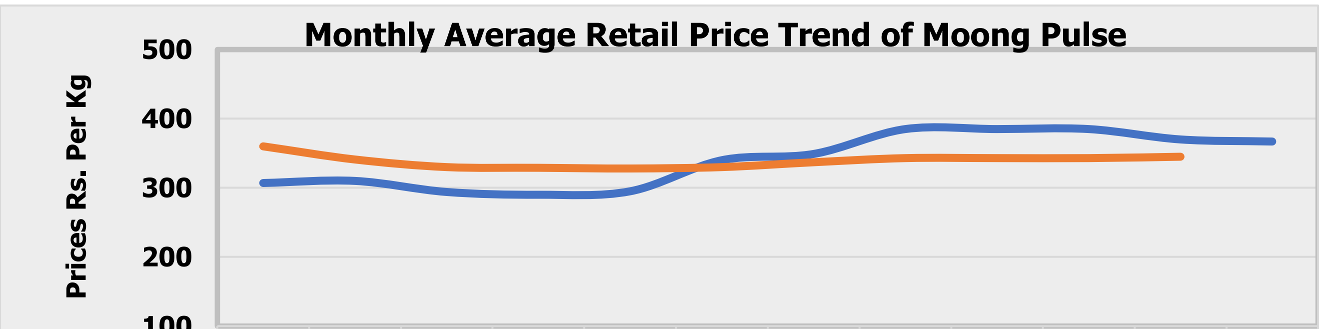
- During year 2024-25, provincial production of moong appeared to be 1,15,633 tons, showing surplus of 8374 tons as compared to provincial consumption requirement i.e. 1,07,259 tons.



Source: Crop Reporting Service Punjab & Agricultural Statistics of Pakistan

Market Prices

- Due to less local production, prices of moong remained on higher side in local markets. In May 2026, the monthly average retail price of moong in Punjab was recorded at Rs. 345 per kilogram. The trend of monthly average retail prices for moong is presented below:



	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2024-25	307	310	294	290	295	340	349	385	385	385	370	367
2025-26	360	341	330	329	328	330	337	343	343	343	345	

SUPPLY MANAGEMENT ADVISORY

Assessment

Due to minimal local production, moong supply is under pressure, leading to higher prices in domestic markets. However, current moong prices are still comparatively lower than those recorded last year. Minor crop of moong arrives during May, however due to less quantum, its impact is minimal on prices.

Forecast

Due to low local production, moong prices are expected to remain on the higher side in domestic markets. However, the main crop will arrive in August 2026, after which the supply situation is likely to improve.

Advisory

- The District Administration, with the assistance of the concerned EADA (E&M) and Secretaries Market Committee, should closely monitor the supply situation and arrange sufficient quantities to meet consumption requirements with the help of commission agents and traders.
- Price Control Magistrates should carry out vigilant monitoring of retailers and take strict action to reduce the gap between notified retail prices and open market rates.
- The Agriculture Department must introduce high-yielding and resistant seed varieties and encourage farmers to increase local moong production to meet consumption needs.

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

GOVERNMENT OF PUNJAB

Food Safety and Consumer Protection Department

Directorate of Agriculture Economics & Marketing

Strengthening Agriculture Marketing Information Service (SAMIS) Project

Contact Number: 042-99201094