



FOOD IN FOCUS

February 2026





PREFACE

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

In addition, this edition provides strategic policy recommendations for the District Administration, Agriculture Department and Market Committees, emphasizing the need for vigilant monitoring of essential commodity supplies and the adoption of proactive measures to ensure their availability at affordable prices. The report further underscores the persistent insufficiency of domestic production in meeting national consumption needs, thereby highlighting the critical reliance on imports to bridge supply gaps.

We are confident that the analytical insights and policy guidance presented in this report will enable stakeholders to make informed decisions and capitalize on emerging opportunities in today's dynamic food market. It remains our aspiration for "Food in Focus" to continue serving as a reliable reference and strategic resource for all stakeholders across the food sector.



ABSTRACT

This report is based on data collected from a range of credible and authoritative sources, including the 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), Global Pulses Confederation (GPC), Crop Reporting Service Punjab and Market Committees across Punjab. It comprehensively examines production trends, supply conditions, price movements, trade flows, international market developments and prevailing domestic market dynamics. Furthermore, the report offers in-depth insights into the current market situation along with an assessment of the likely future outlook. A brief overview of the prevailing supply and price scenario of major vegetables and pulses is presented below:

- **Tomato** supply is mainly arriving from Sindh. Due to cold weather situation, ripening process of tomato has slowed down which temporarily disrupted supply situation and resulted in price hike in local markets. As temperature tends to be normal, tomato supply will be smooth. However, demand of tomato is likely to increase manifolds during Ramzan-2026 and subsequently its price may increase.
- **Onion** supply is primarily arriving from Sindh, concurrently onion supply is also available from some areas of South Punjab (D.G. Khan, Rajanpur & Rojhan). Due to availability of sufficient supply, onion price is exhibiting stable trend in local markets. However, during Ramzan-2026 prices may slightly increase due to its high demand.
- Local production season of **Potato** is in full swing. As per Crop Reporting Service (CRS) Punjab, this year expected production of potato is recorded at 12.1 million tons which is 23.4% higher in contrast with last year. In addition, potato export is suspended, therefore surplus potato supply is available on very low prices in local markets. During Ramzan-2026 demand of potato increases exponentially, however its prices are not expected to increase considerably due to its sufficient availability.
- Currently, supply & price situation of **Garlic** is stable on account of availability of local supply. In addition, some supply from KP is also available besides regular import from China. However, price of garlic is expected to increase during Ramzan-2026 due to its high demand. Next local crop will be available during March-2026, thereafter garlic prices are expected to decline in local markets.
- Due to negligible production of **Ginger**, its consumption requirement remains heavily dependent on import from Thailand and China. Production season in China & Thailand is in progress, resultantly import of ginger is smooth and its prices are showing stable trend in local markets. In case of **Green Chilies**, its main supply is arriving from Sindh, thus supply & price situation of green chilies is stable in local markets. During Ramzan-2026, supplies of ginger and chilies is expected to remain stable but their high demand may lead to slight surge in their prices.
- Local production of **pulses** is limited, therefore their import is imperative cater for consumption requirements. Previously, international prices of pulses were on lower side, due to which import of pulses remained smooth leading to their stable supply situation in local markets. However, recently an increasing trend in international prices of pulses is being observed. In case this surge persists, it may be reflected in terms of increasing local prices of pulses. Moreover, during Ramzan-2026 demand of pulses is likely to increase which may set their prices to increase.

Advisory Measures:

- The Ministry of National Food Security & Research and Ministry of Commerce, Islamabad may take measures to encourage potato export for stabilization of prices of potato in the local markets.
- The District Administration with the help of EADAs and Secretaries Market Committee, should ensure smooth supply chain management of essential commodities in the markets and take all measures to avoid any supply gap during Ramzan-2026.
- The Agriculture Department should introduce off-season seed varieties to expand the local production season of essential vegetables and high-yielding varieties of pulses to reduce reliance on imports. Furthermore, ginger seed varieties compatible with local agro-climatic conditions should also be introduced, so its local production could be ensured.



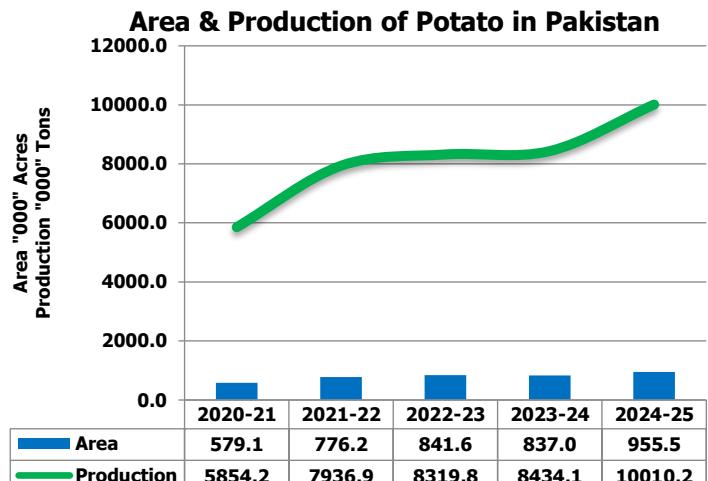
1. Potato



NATIONAL OVERVIEW

Domestic Area & Production:

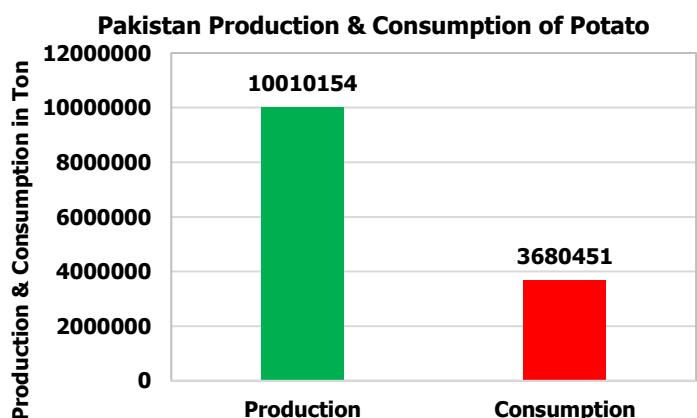
- The domestic production of potato is sufficient and surplus with reference to domestic consumption requirements. As per Agricultural Statistics of Pakistan and the Economic Survey of Pakistan, domestic production of potato has reached to 10.01 million tons during year 2024-25, which depicts considerable increase of 18.68 percent in contrast with last year.
- Long-term trends illustrate a gradual expansion in both the cultivated area and overall production of potatoes, reflecting sustained growth in this segment of the agricultural sector.



Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics

Domestic Production & Consumption:

- This estimated annual domestic consumption requirement of potato is 3,680,451 tons, whereas domestic potato production happened to be 10.01 million tons during year 2024-25, which resulted in surplus production of 6.32 million tons.



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

Province wise Area & production:

- With an overwhelming share of nearly 98 percent in national output, Punjab remains the principal hub of potato production in Pakistan. Beyond fulfilling its own consumption needs, the province serves as the primary supplier to other provinces,



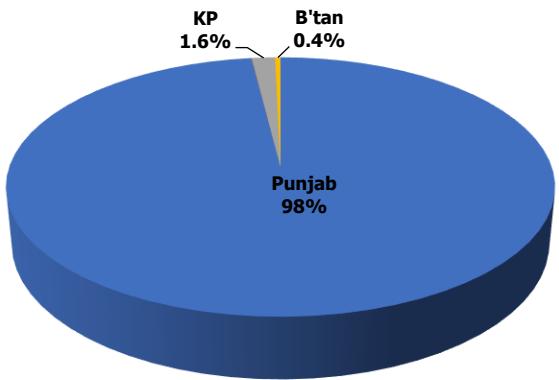
Food Safety and Consumer Protection Department



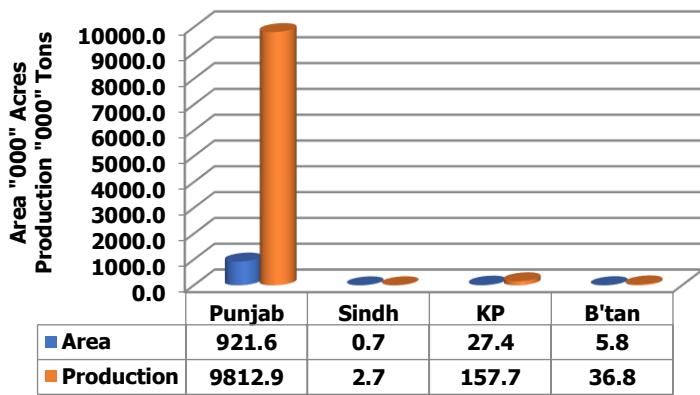
whereas the contribution of the remaining provinces to total national production remains minimal.

- During year 2024-25, Punjab attained 9.812 million tons of potato production from cultivated area of 921,600 acres. In comparison, Khyber Pakhtunkhwa produced 157,700 tons having merely 1.6% share in total domestic production, while production levels in Balochistan and Sindh remained relatively negligible 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

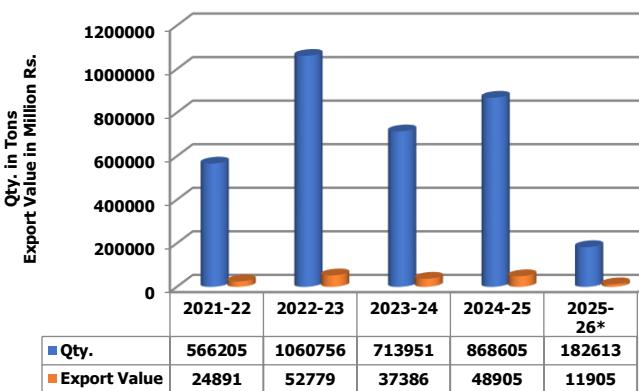


Source: Pakistan Bureau of Statistics (PBS)

Export Insights:

- On account of significant production of potato, Pakistan undertakes enormous export of potato each year to earn foreign exchange reserves. During the fiscal year 2024-25, export of potato was registered at 868,605 tons, generating export revenue of Rs. 48,905 million. In the year 2025-26 (July-December), export volumes reached to 1,82,613 tons, yielding Rs. 11,905 million in foreign exchange. Major destinations for export of Pakistani potatoe include the U.A.E., Sri Lanka, Afghanistan, Oman, Malaysia and Kuwait.

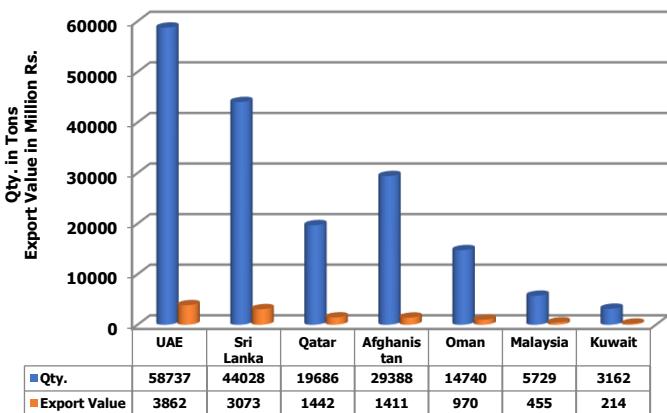
Export of Potato



*=Export during July 2025 to December 2025

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

Country Wise Export of Potato 2025-26



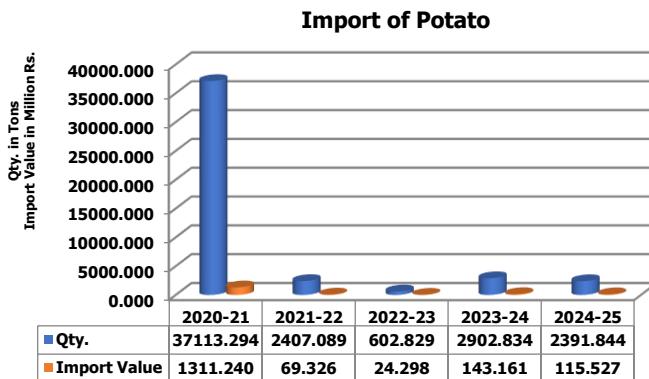
*=Export during July 2025 to December 2025

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

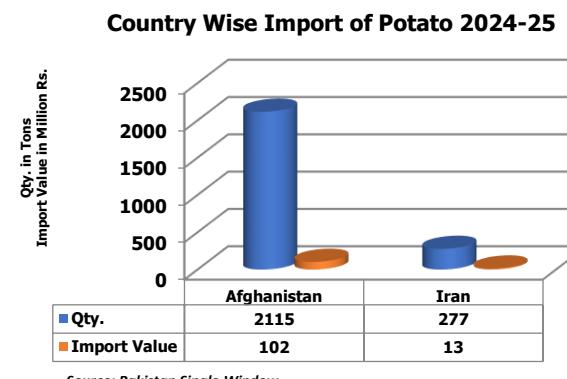


Import Insights:

- As such Pakistan does not require potato import, however some volume is imported only for seed purposes. In year 2024-25, potato import was recorded at 2,392 tons, whereas during year 2025-26 (July-December) import has not been recorded so far. Potato import for seed purpose is mainly sourced from Afghanistan and Iran.



Source: PBS & Pakistan Single Window

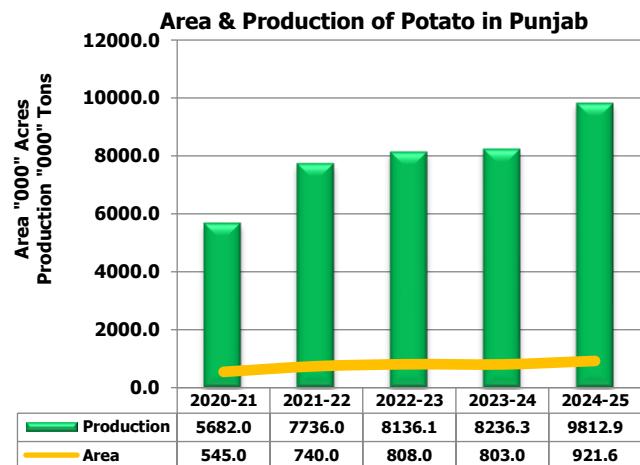


Source: Pakistan Single Window

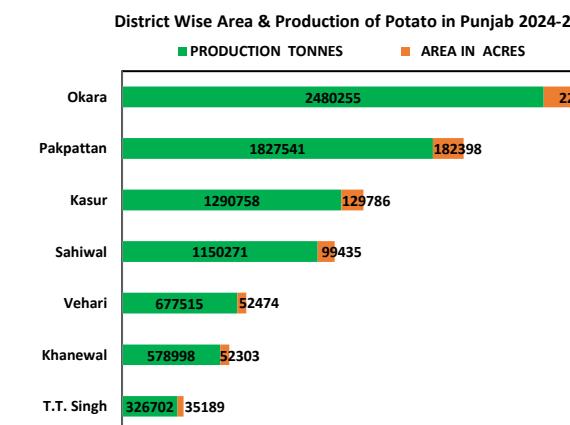
PROVINCIAL OVERVIEW

Area & Production:

- Potato cultivation and production in Punjab has been showing increasing trend during last 5 years. In the year 2024-25, potato cultivation recorded at 921,600 acres which is 14.7% increase over the preceding year and a 69.1% high relative to year 2020-21.
- Likewise, potato production recorded at 9.813 million tons, which is 19.14% increased as compared to last year and 72.7% high in contrast with production recorded during year 2020-21.
- Okara is a leading potato-producing district in Punjab with production level of 2.480 million tons. Other prominent potato-producing districts are Pakpattan, Kasur, Sahiwal, Vehari, Khanewal and Toba Tek Singh.



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

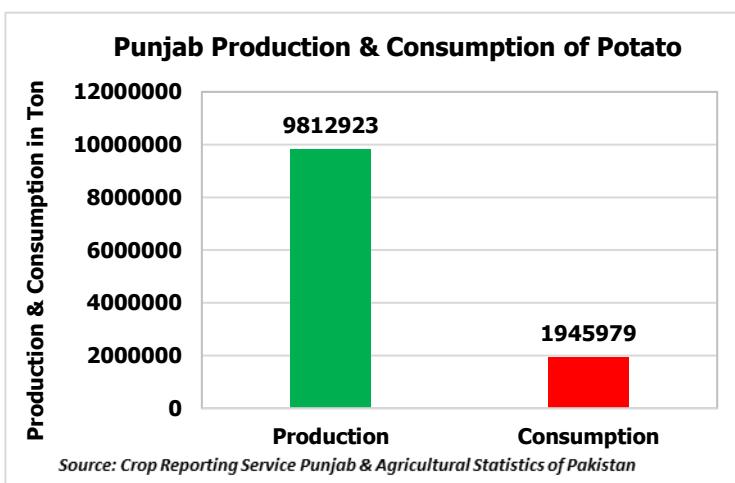


Source: Crop Reporting Service Punjab



Provincial Production & Consumption:

- In year 2024-25, Punjab's potato production reached 9.812 million tons, while the province's estimated consumption requirement stood at 1.945 million tons. Consequently, the province experienced a surplus of 7.86 million tons in potato supply.



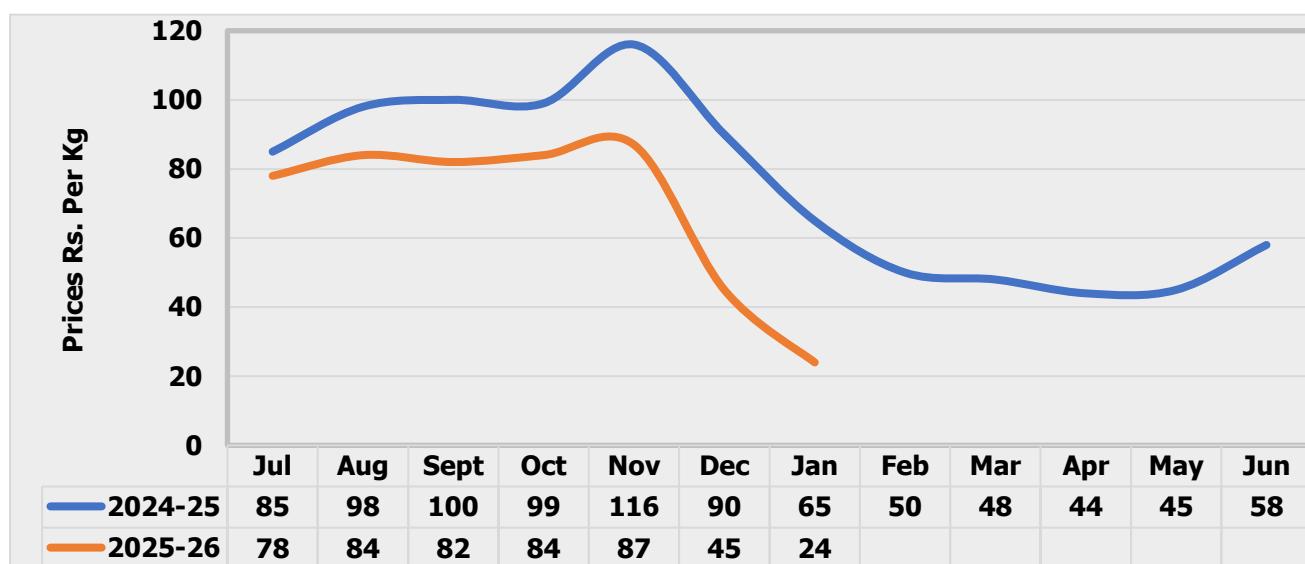
Supply Cycle:

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

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

Retail Market Prices:

- Local production season of potato is in full swing, therefore adequate fresh supply of potato is available from core producing areas. Resultantly, prices of fresh potato are on very lower side in local markets. During month of January, average retail price of potato fresh remained at Rs.24/Kg in local markets.





SUPPLY MANAGEMENT ADVISORY



Assessment

Local production season of potato is in full swing and surplus supply of potato is available in local markets. According to the Crop Reporting Service (CRS) Punjab, this year area under potato cultivation has expanded to 1.142 million acres, reflecting a 24% increase over last year and the estimated potato production has risen to 12.1 million tons, marking 23.4% increase in contrast with last year. Moreover, export via Afghanistan border is halted, resultantly potato supply is in surplus, and its prices are lying on very lower side.

Forecast

The record production of potato has led prices on very lower side. As a result of abundant supply of fresh crop of potato, its supply & price situation is expected to remain stable in local markets. During Ramzan 2026, demand of potato increases manifolds, but its price is not expected to increase considerably due to its surplus availability.



Advisory



- Ministry of National Food Security & Research and Ministry of Commerce, Islamabad may take measures to encourage potato export for stabilization of prices of potato in the local markets.
- Moreover, District Administration with the help of relevant EADA (E&M) and Secretaries Market Committee should line up arrangements to ensure smooth supply of potato during Ramzan-2026.



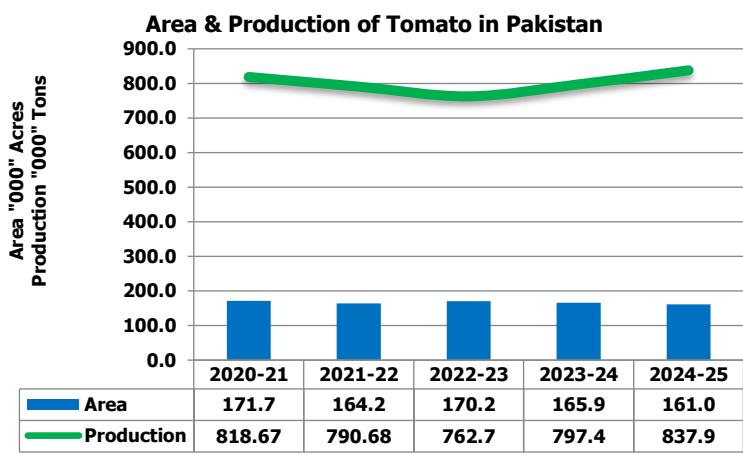
2. TOMATO



NATIONAL OVERVIEW

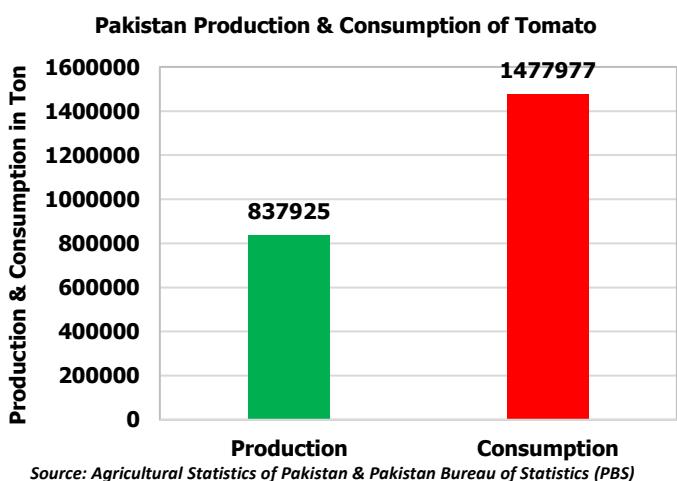
Domestic Area & Production:

- Although the area under cultivation saw a slight decline, domestic tomato production has continued its steady growth trend over the last three years.
- The year 2024-25 witnessed national tomato production reaching 8,37,925 tons, representing a 5.07% increase over the previous year, while the cultivated area contracted to 161,000 acres, showing a 3.95% reduction compared to the prior year.



Domestic Production & Consumption:

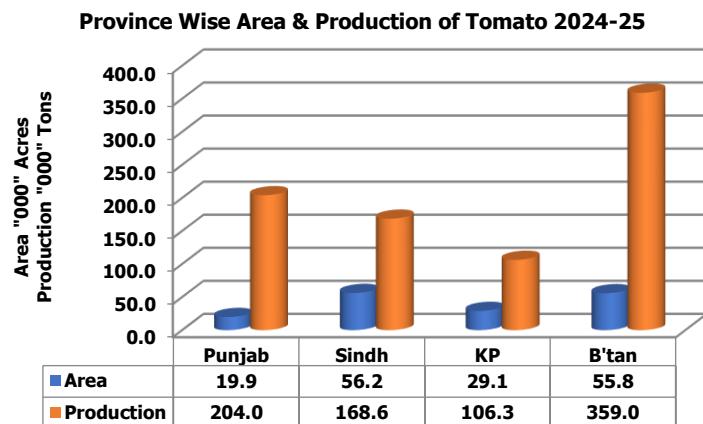
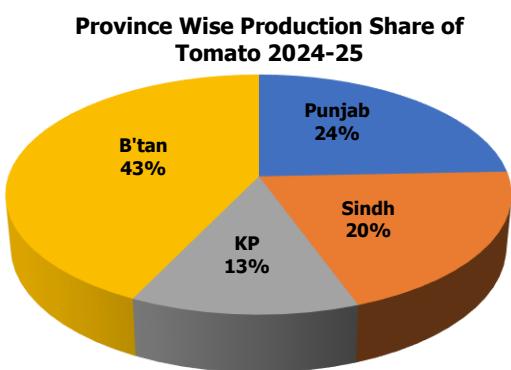
- Even with the continued rise in domestic tomato production, output still falls significantly short of the country's consumption needs. Domestic demand, estimated at 1,477,977 tons, far exceeds production of just 837,925 tons, creating an annual shortfall of 640,052 tons.
- As a result, Pakistan continues to depend on tomato imports to maintain a steady supply in local markets throughout the year.





Province wise Area & Production:

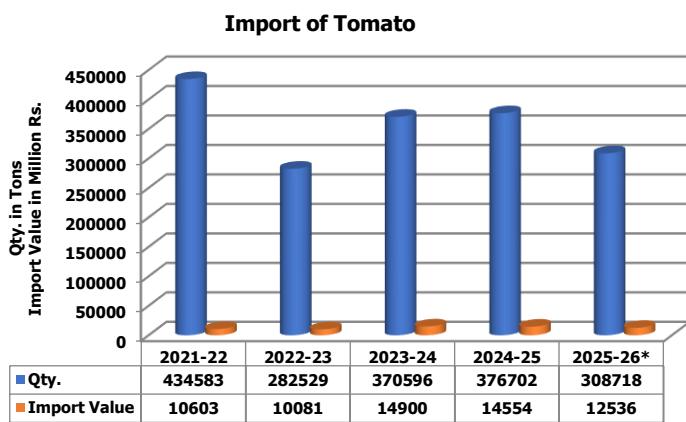
- Balochistan emerges as the leading tomato-producing province, contributing 43% to the national output. Punjab holds the second position with a 24% share, followed by Sindh at 20% and Khyber Pakhtunkhwa at 13%.
- In year 2024-25, Balochistan recorded the highest tomato production, totaling 359,000 tons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



Source: Agricultural Statistics of Pakistan

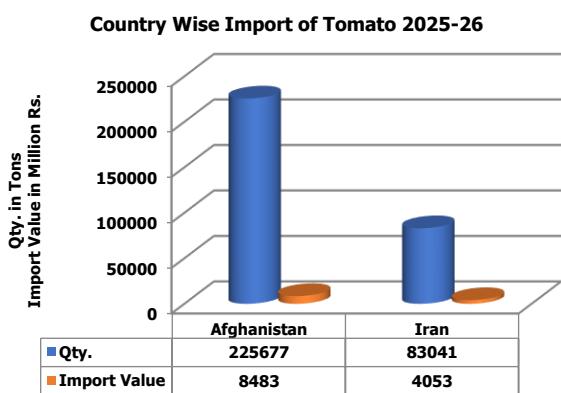
Import Insights:

- In periods of constrained domestic supply, Pakistan's tomato consumption largely depends on imports from Afghanistan and Iran. In year 2024-25, tomato imports were registered at 376,702 tons, costing Rs. 14,554 million, reflecting a slight increase in quantity but a minor decrease in value compared to the previous year. However, during year 2025-26 (July-December), imports reached to 3,08,718 tons with an expenditure of Rs. 12,536 million.
- Afghanistan and Iran are the primary sources of tomato imports. During year 2025-26 (July-December), imports from Afghanistan amounted to 225,677 tons at a cost of Rs. 8,483 million, while imports from Iran stood at 83,041 tons, incurring Rs. 4,053 million.
- Since November 2025, Punjab has not required tomato imports, as sufficient supplies have been available from Sindh.



*=Import during July 2025 to December 2025

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



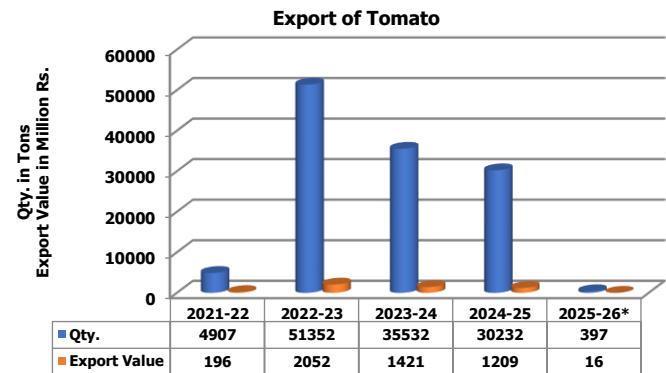
*=Import during July 2025 to December 2025

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



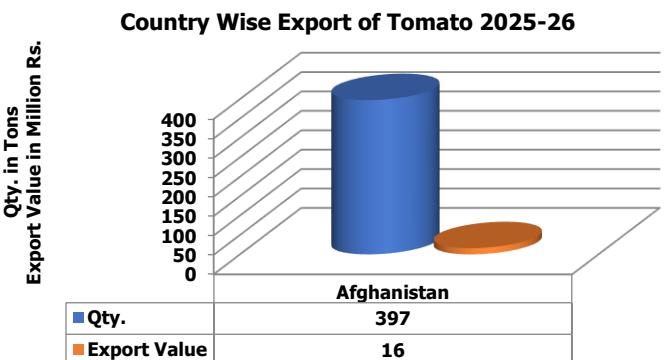
Export Insights:

- Despite its significant dependence on imports to meet domestic demand, Pakistan also engages in tomato exports. Although export volumes remain much smaller than imports, they contribute positively to foreign exchange earnings.
- In year 2024-25, Pakistan exported 30,232 tons of tomatoes, earning Rs. 1,209 million, reflecting a slight decline in both quantity and revenue compared to the previous year.
- For 2025-26 (July-December), tomato exports amounted to 397 tons, generating Rs. 16 million in revenue, with Afghanistan remaining the main destination for these exports.
- Tomato exports are generally concentrated between January and May.



*=Export during July 2025 to November 2025

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



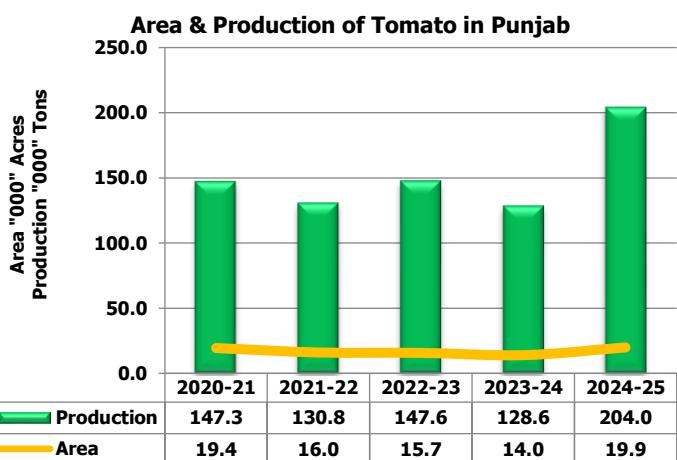
*=Export during July 2025 to December 2025

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

PROVINCIAL OVERVIEW

Area & Production:

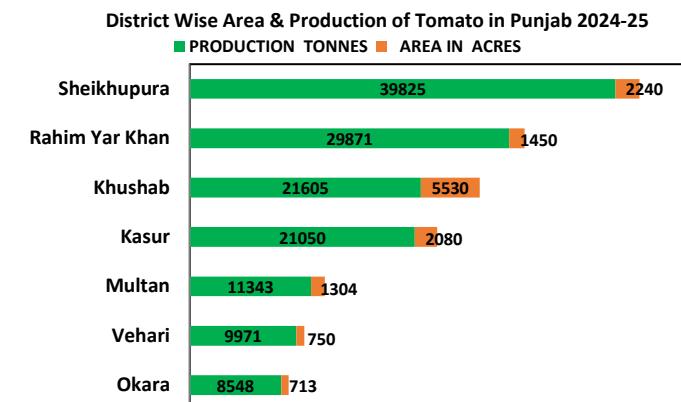
- Tomato in Punjab has experienced significant fluctuations regarding cultivated area and production over the past five years. In year 2024-25, the area dedicated to tomato cultivation in Punjab expanded markedly to 19,900 acres, marking a 42.14% increase compared to the previous year.
- Similarly, tomato production also increased sharply to 204,000 tons during year 2024-25, which represents a substantial 58.6% increase over the past year.



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



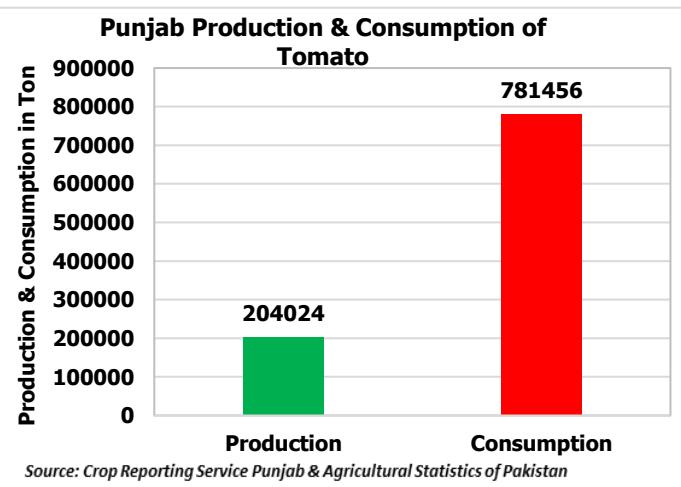
- Punjab's tomato production is concentrated in several key districts, notably Sheikhupura, Rahim Yar Khan, Khushab, Kasur, Multan, Vehari and Okara.
- Among these, Sheikhupura ranked first with an output of 39,825 tons, followed by Rahim Yar Khan in second place with 29,871 tons, while Khushab secured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



Source: Crop Reporting Service Punjab

Provincial Production & Consumption:

- During year 2024-25, provincial tomato production stood at 2,04,024 tons, which remained substantially below the provincial consumption requirement of 781,456 tons, resulting in a deficit of 577,432 tons.



Supply Cycle:

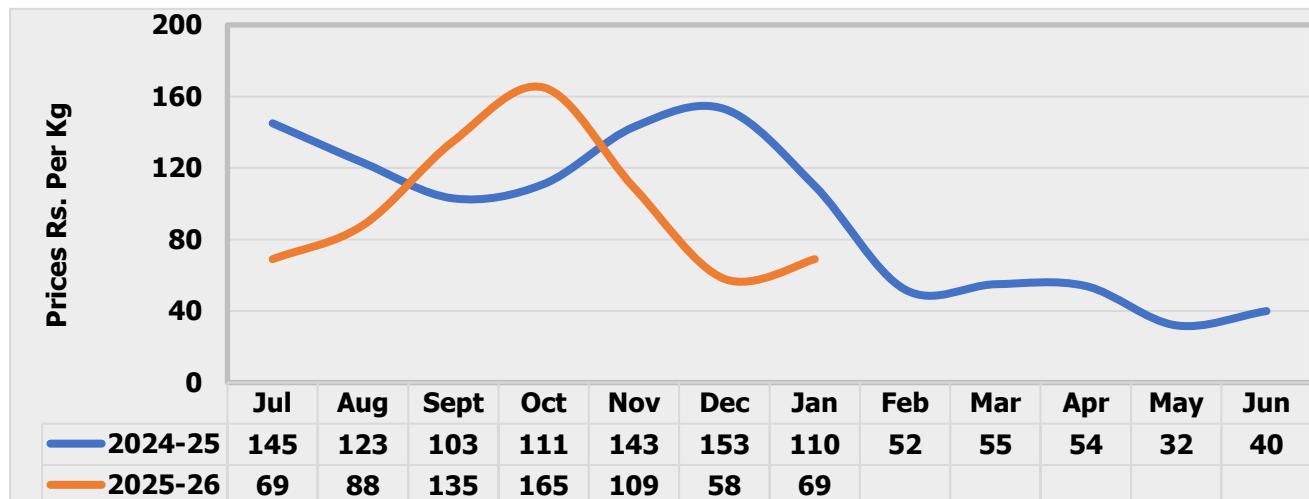
- The key tomato-producing districts in each province, along with their respective production seasons, are presented below:

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:

- Due to availability of major supply of tomato from Sindh, its price showed significant decrease in local markets. Monthly average retail price of tomato in Punjab is Rs.69 per Kg during month of January, 2026. Due to prevailing cold weather situation, tomato supply is temporarily disturbed, resultantly its price has shown slight surge in the markets.



SUPPLY MANAGEMENT ADVISORY



Assessment

Production season of tomato in Sindh is ongoing, from where entire supply is arriving in local markets. Due to availability of Sindh crop, supply situation of tomato has improved and prices showed considerable decrease in local markets. However, recently moderate increase in price is being observed, which is due to temporary supply disturbance as a result of slow ripening process led by prevailing cold weather situation in Sindh.

Forecast

As weather situation is turning to be normal in tomato producing districts of Sindh, therefore supply of tomato is likely to improve in coming days and its price is expected to come in normal range. During Ramzan-2026, demand of tomato increases substantially which may cause slight increase in tomato prices in local markets.





Advisory



- District Administration in coordination with concerned In-charge Sahulat Bazar, EADA and Secretaries Market Committee should maintain smooth supply of tomato from Sindh and also carve out plan with the help of commission agents to ensure sustained supply of tomato during month of Ramzan-2026.
- Monitoring of auction proceeding in Agricultural Produce Markets must be done regularly and fixation of tomes prices should be in a transparent and fair manner.
- Price Control Magistrates should ensure true implementation of notified prices and take strict actions against violators.

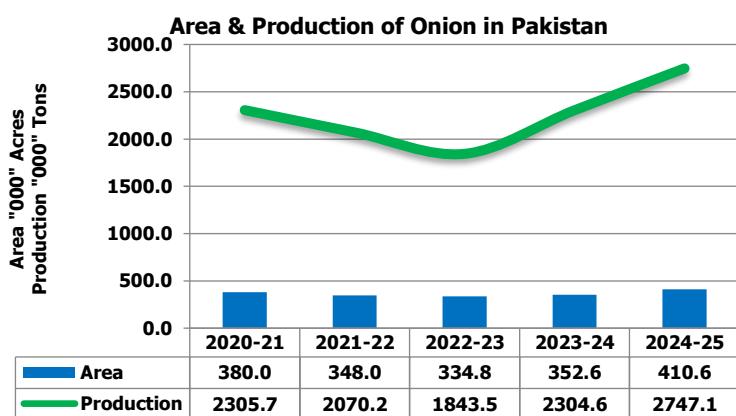
3. ONION



NATIONAL OVERVIEW

Domestic Area & Production:

- Over the past three years, Pakistan has experienced steady growth in both onion production and the area under cultivation. In year 2024-25, national onion production increased to 2.747 million tons, marking a 19.2% rise compared to the preceding year. At the same time, onion cultivation expanded to 410,600 acres, reflecting a year-on-year increase of 16.44%.

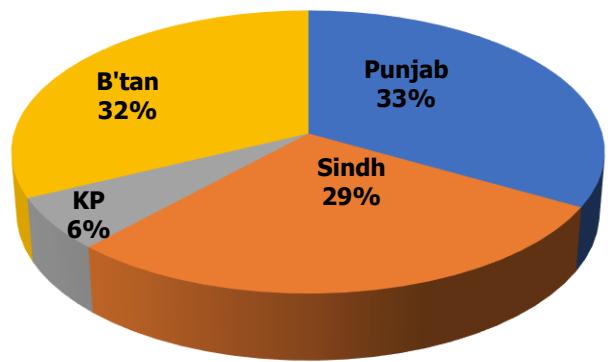




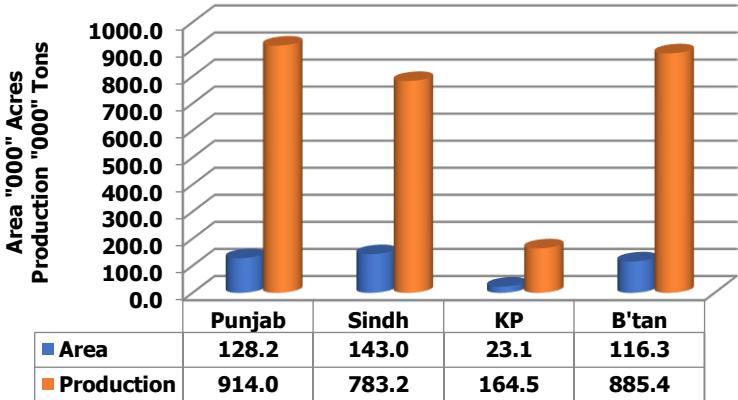
Province wise Area & Production:

- A clear change in the provincial production pattern has been observed during year 2024-25, as Punjab rose to become the largest onion-producing province, contributing 33% of national output, followed by Balochistan with 32%, Sindh with 29% and Khyber Pakhtunkhwa with 6%.
- Previously, during year 2023-24, the leading position in national onion production was held by Balochistan, with Sindh placed second and Punjab ranking third; however, this hierarchy shifted markedly in year 2024-25 when Punjab surpassed both provinces to claim the top position.
- A leading role in onion production was assumed by Punjab in year 2024-25, with total output reaching 914,000 tons.
- By comparison, Balochistan registered production of 885,400 tons, whereas Sindh recorded an output of 783,200 tons. Khyber Pakhtunkhwa contributed a relatively smaller share, with onion production amounting to 164,500 tons.

Province Wise Production Share of Onion 2024-25



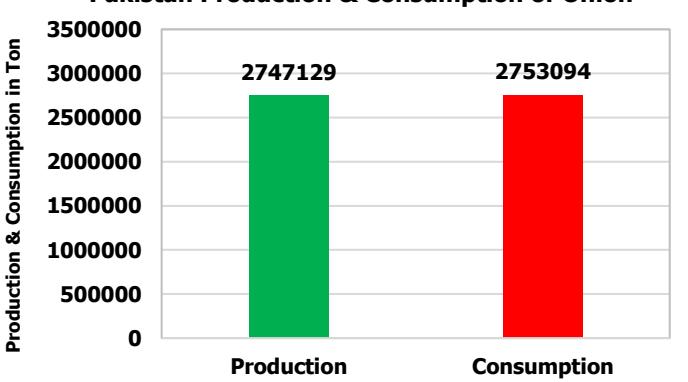
Province Wise Area & Production of Onion 2024-25



Domestic Production & Consumption:

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

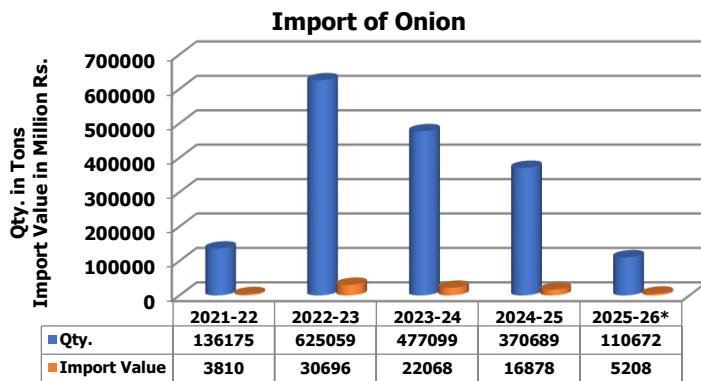
Pakistan Production & Consumption of Onion



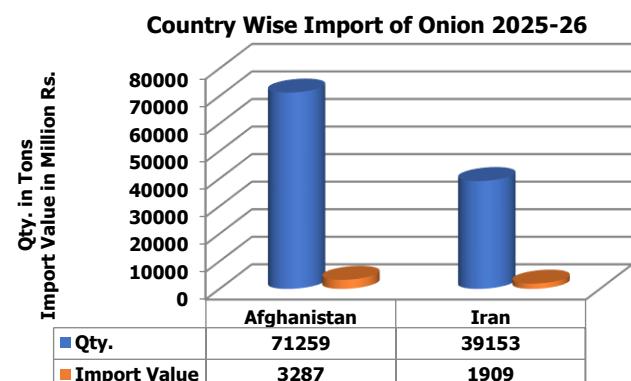


Import Insights:

- In year 2024-25, Pakistan imported 370,699 tons of onions at a cost of Rs. 16,878 million, indicating a reduction in both import volume and value compared to the previous year.
- By contrast, during year 2025-26 (July-December), onion imports totaled 110,672 tons, with an associated expenditure of Rs. 5,208 million, while Afghanistan and Iran continued to serve as the principal sources for import of onion.



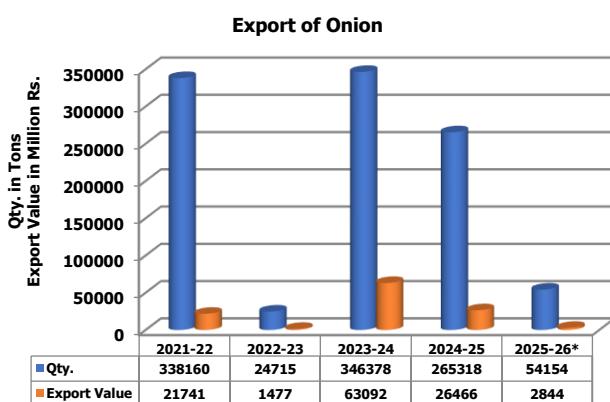
*=Import during July 2025 to December 2025
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)



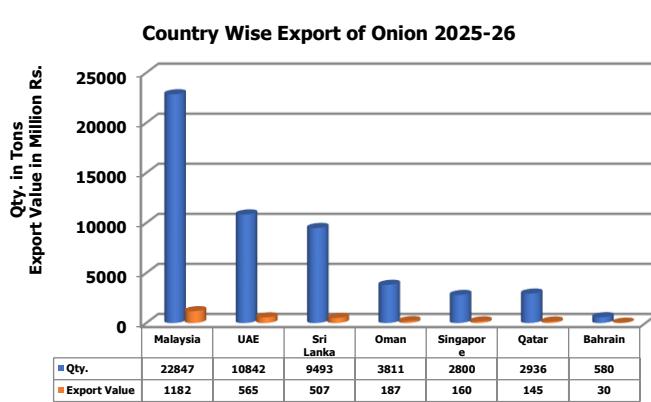
*=Import during July 2025 to December 2025
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)

Export Insights:

- Alongside importing onions to meet domestic consumption needs, Pakistan also exports onions to international markets, thereby earning valuable foreign exchange.
- During year 2024-25, onion exports totaled 265,318 tons and generated Rs. 26,466 million in revenue; however, both export volume and value declined compared with the previous year. During year 2025-26 (July-December), exports reached 54,154 tons, yielding earnings of Rs. 2,844 million.
- Pakistan's onion exports are mainly directed to Malaysia, the United Arab Emirates (UAE), Sri Lanka, Singapore, Oman, Qatar and Bahrain, with shipments to Malaysia, the UAE and Sri Lanka remaining substantially higher than those to other destinations.



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



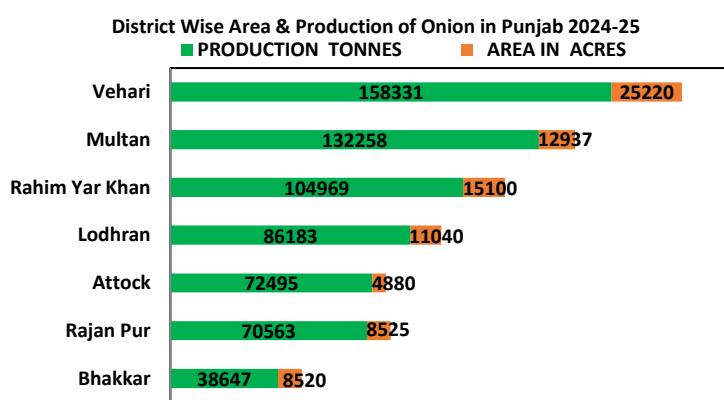
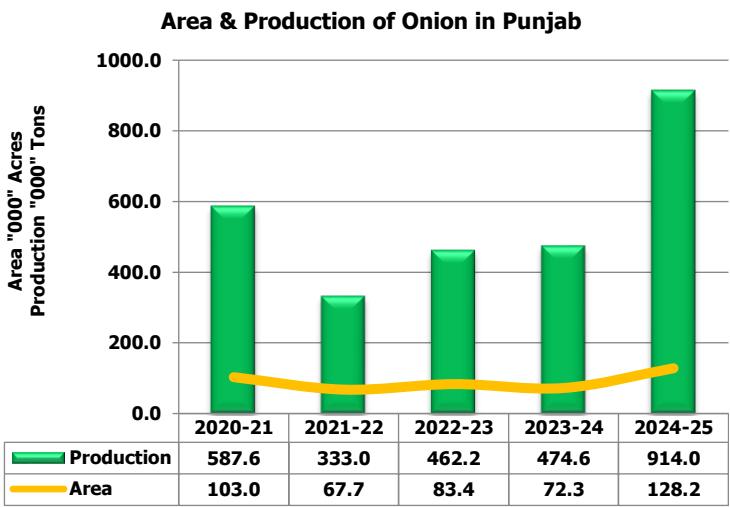
*=Export during July 2025 to December 2025
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)



PROVINCIAL OVERVIEW

Area & Production:

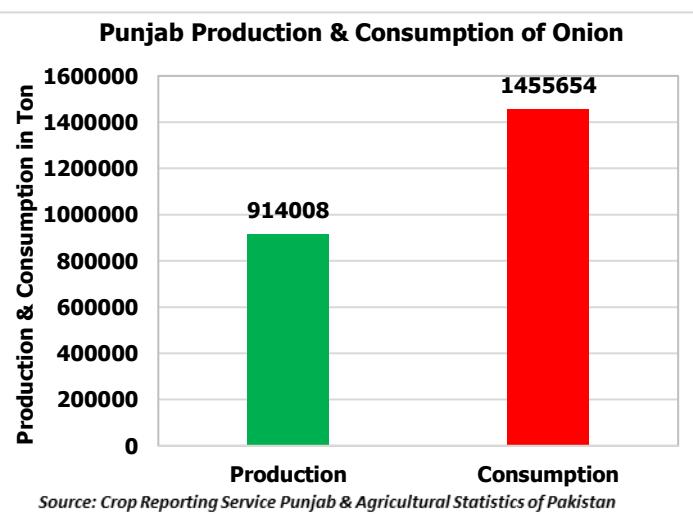
- Punjab's onion has experienced a consistent upward trend in production over the past four years, despite fluctuations in the cultivated area.
- In year 2024-25, the cultivated area expanded markedly to 128,200 acres, representing a substantial 77.3% increase over the previous year. Consequently, onion output surged to 914,000 tons, reflecting a significant 92.5% growth compared to the preceding year.
- The principal onion-producing districts in Punjab include Vehari, Multan, Rahim Yar Khan, Lodhran, Attock, Rajanpur and Bhakkar.
- Vehari ranked first with an onion production of 158,331 tons. Multan secured second rank with 132,258 tons, while Rahim Yar Khan stood at third position with production of 104,969 tons.



Source: Crop Reporting Service Punjab

Provincial Production & Consumption:

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





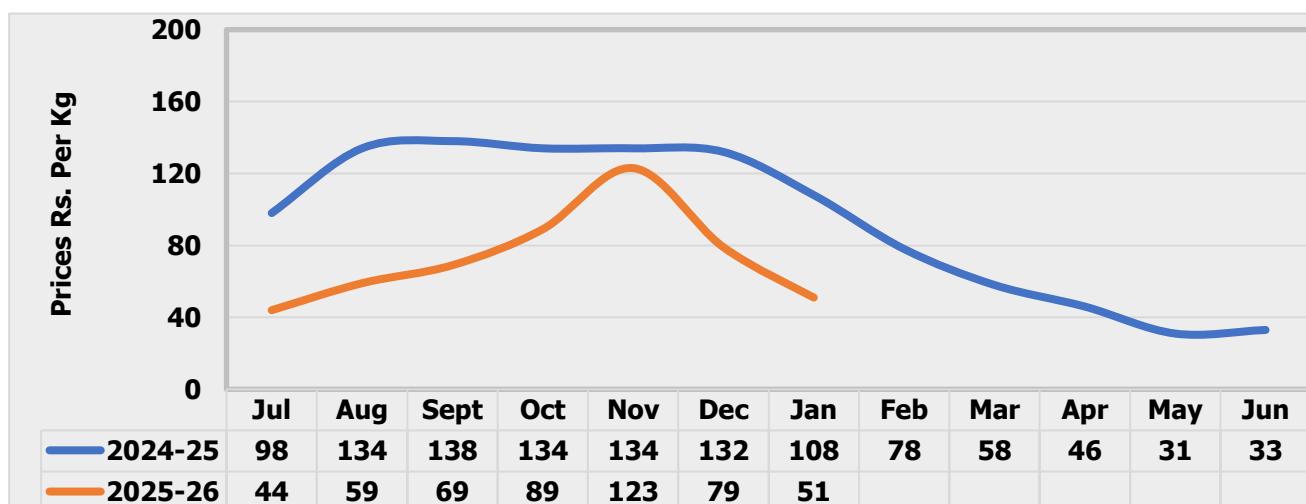
Supply Cycle:

- 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.	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

Market Price:

- Presently, onion production season in Sindh is on full swing and supply from South Punjab (D.G. Khan, Rajanpur, Rojhan) is also available, therefore supply situation of onion has increased and its price has decreased in local markets. The graphical trend of monthly average retail price of onion in Punjab is given as under:



SUPPLY MANAGEMENT ADVISORY



Assessment

Supply situation of onion is stable due to its sufficient availability from Sindh as well as from South Punjab (D.G Khan, Rajanpur & Rojhan). Thus, supply & price situation of onion is experiencing stability in local markets.



Forecast

On account of adequate arrival from Sindh and South Punjab, supply & price situation of onion is anticipated to be normal. However, due to high demand during month of Ramzan-2026 price of onion may slightly increase.



Advisory



- District Administration with the help of concerned In-charge Sahulat Bazar, EADA and Secretaries Market Committee should keep unrestrained supply of onion and also make arrangements for ensuring smooth supply during Ramzan-2026 keeping close liaison with commission agents.
- Regular monitoring of auction proceedings in Agricultural Produce Markets is essential, along with the implementation of a transparent and fair mechanism for rate fixation.
- Retailers should be closely monitored by Price Control Magistrates to ensure implementation of notified prices.

4. GARLIC

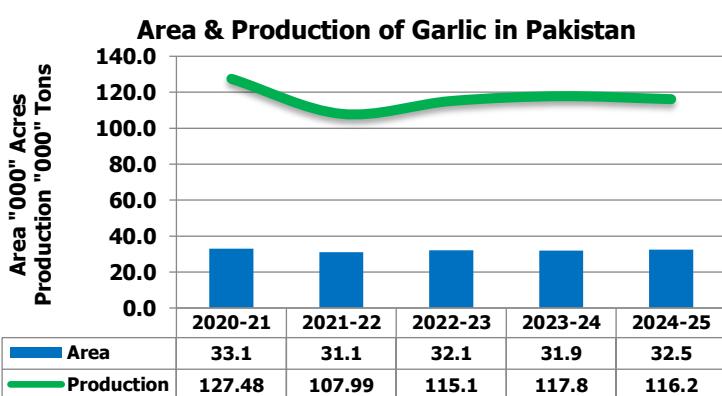


NATIONAL OVERVIEW

Domestic Area & Production

- Domestic cultivation of garlic is exhibiting stable trend over the years and same is the case with its production.
- In year 2024-25, the area under garlic cultivation expanded slightly to 32,500 acres, registering an increase of 1.88% over the preceding year.

Whereas, domestic production of garlic stood at 116,200 tons, representing a marginal decline of 1.35% compared to the previous year.

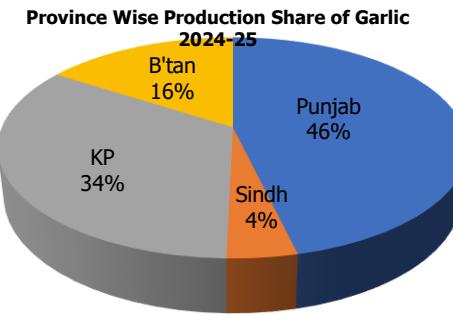


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

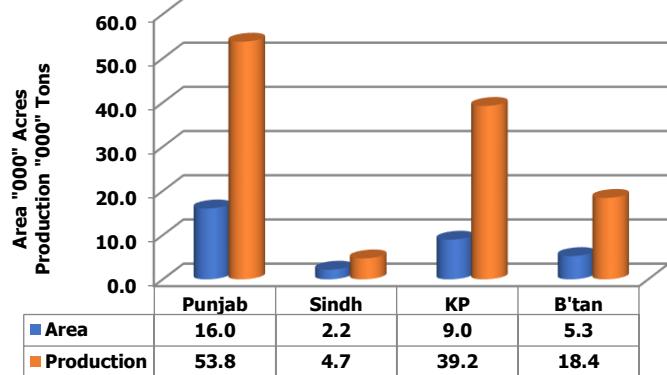


Province wise Area & Production:

- A leading share in national garlic production is held by Punjab, contributing 46% of total output, followed by Khyber Pakhtunkhwa with 34%, Balochistan accounting for 16%, and Sindh contributing the remaining 4%.
- During year 2024-25, garlic production in Punjab amounted to 53,800 tons from 16,000 acres. In comparison, Khyber Pakhtunkhwa recorded an output of 39,200 tons harvested from 9,000 acres. Balochistan followed with production of 18,400 tons from 5,300 acres, while Sindh registered the lowest output at 4,700 tons from a cultivated area of 2,200 acres.



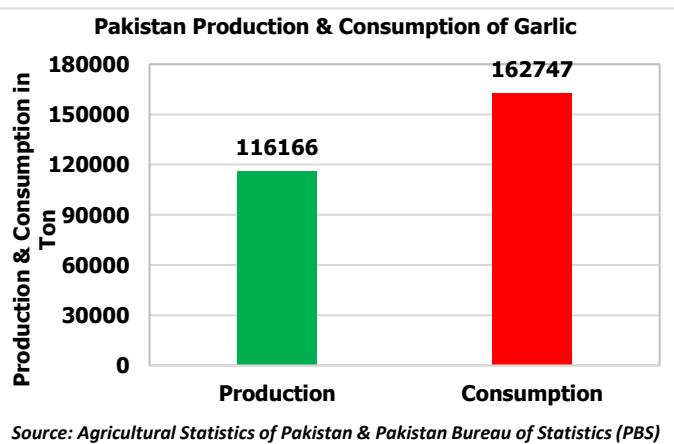
Province Wise Area & Production of Garlic 2024-25



Source: Agricultural Statistics of Pakistan

Domestic Production & Consumption:

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

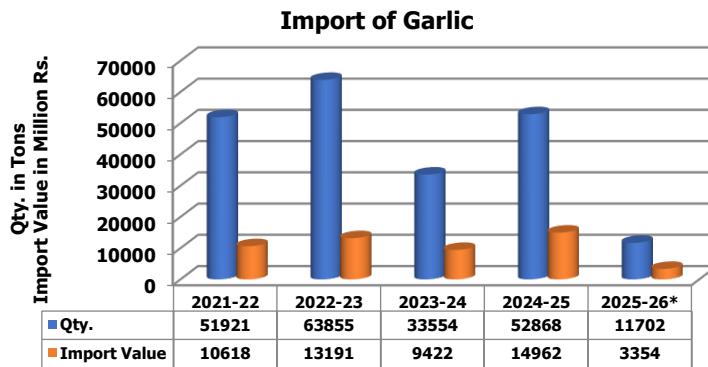


Import Insights:

- Import of garlic is crucial to meet its consumption requirements throughout the year, Pakistan remains reliant on imports from China.
- In 2024-25, garlic imports totaled 52,868 tons, with an expenditure of Rs. 14,962 million. During 2025-26 (July-December), imports from China reached 11,702 tons, involving a cost of Rs. 3,354 million.

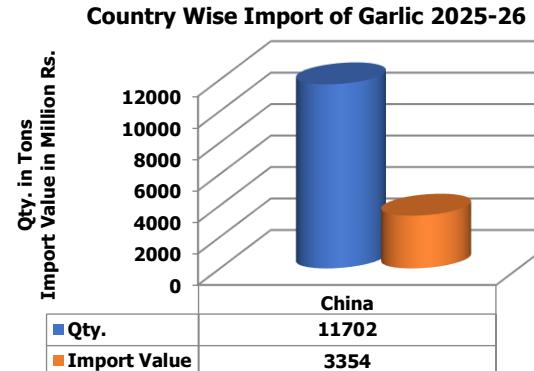


Food Safety and Consumer Protection Department



*=Import during July 2025 to December 2025

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

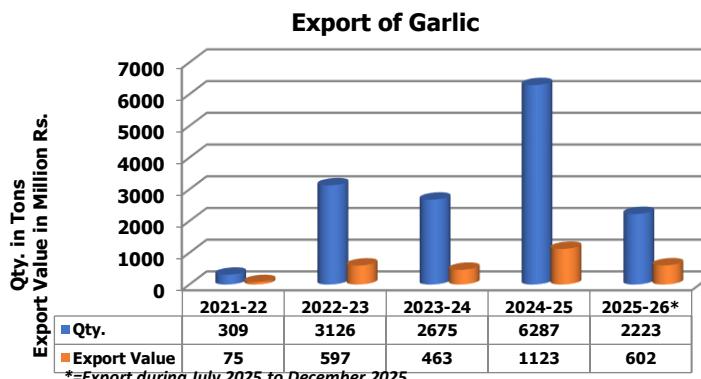


*=Import during July 2025 to December 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics

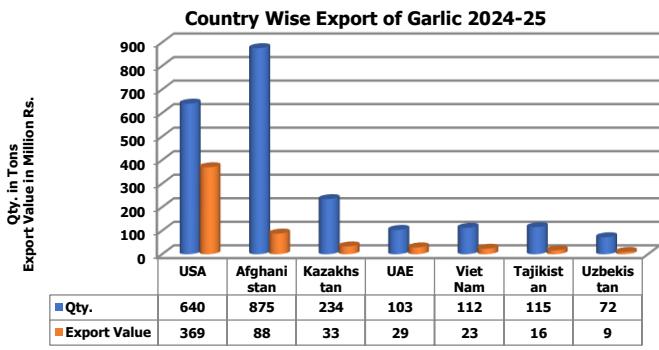
Export Insights:

- Garlic exports were registered at 6,287 tons during year 2024-25, generating export earnings of Rs. 1,123 million. During year 2025-26 (July-December), exports stood at 2,223 tons, contributing Rs. 602 million to foreign exchange earnings.
- Pakistani garlic is exported mainly to the USA, Afghanistan, Vietnam, Kazakhstan, Tajikistan, Uzbekistan, and Mauritius.
- A substantial share of export volume is directed to Afghanistan and the USA, while exports to other destinations remain relatively limited. In value terms, exports to the USA generate significantly higher earnings than those to Afghanistan.



*=Export during July 2025 to December 2025

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



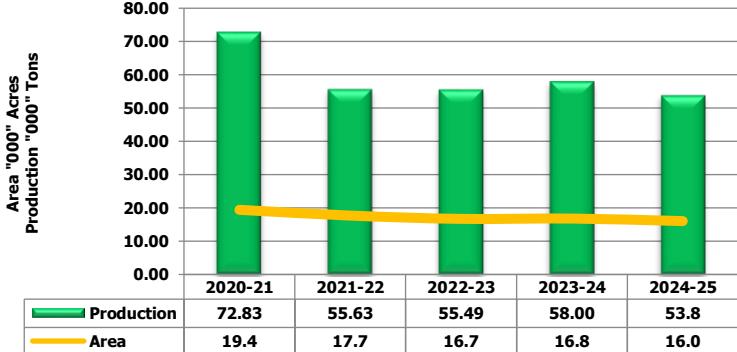
*=Export during July 2025 to December 2025

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

PROVINCIAL OVERVIEW

Area & Production:

- During the last four years, stability has been observed in cultivation as well as production of garlic in Punjab.
- In year 2024-25, cultivated area of garlic in Punjab stood at 16,100 acres, reflecting a year-on-year decline of 4.7% and a



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



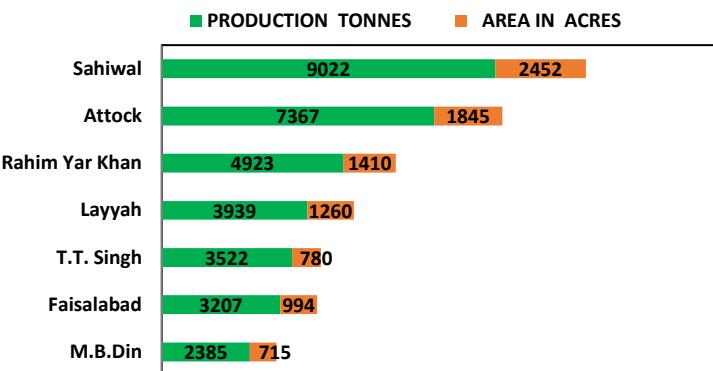
Food Safety and Consumer Protection Department



17.52% reduction compared with the acreage reported in year 2020-21. Garlic production in Punjab has been recorded at 53,800 tons, representing a 7.2% decline compared with the previous year and a 26.1% decrease relative to the production level recorded in year 2020-21.

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

District Wise Area & Production of Garlic Year 2024-25

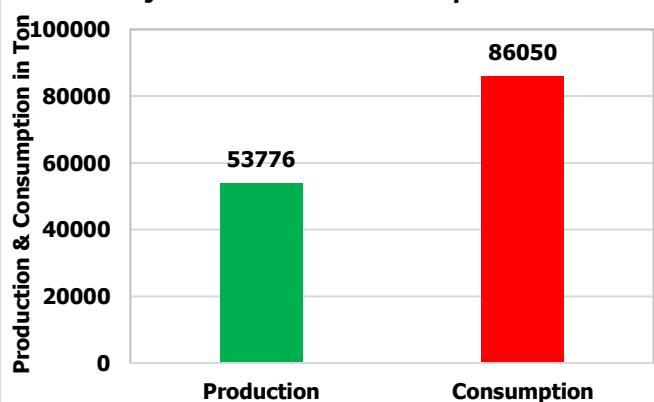


Source: Crop Reporting Service Punjab

Provincial Production & Consumption:

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

Punjab Production & Consumption of Garlic



Source: Crop Reporting Service Punjab & Agricultural Statistics of Pakistan

Supply Cycle:

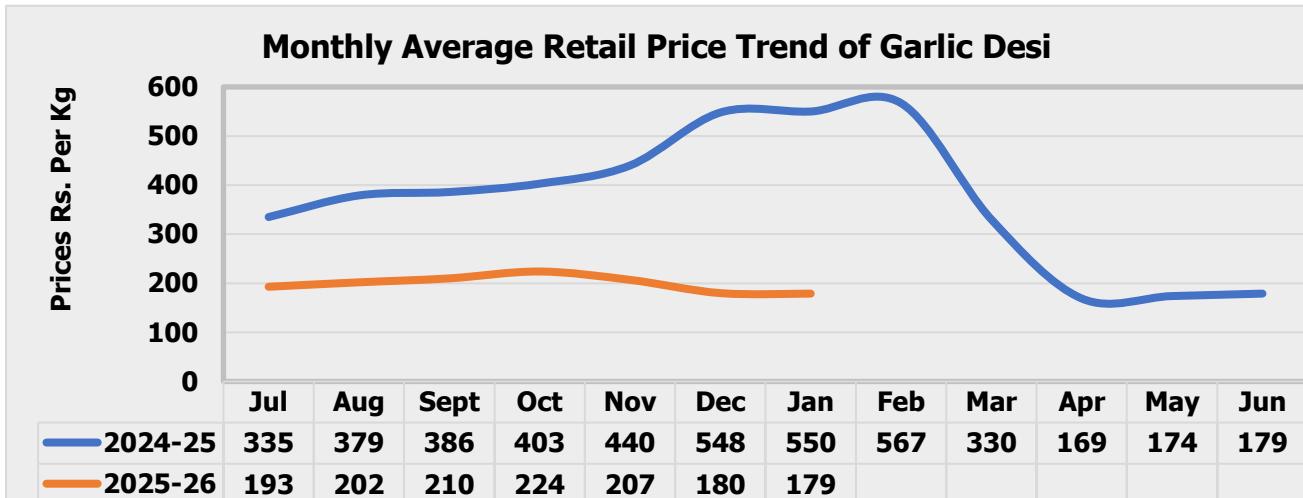
- Province wise major producing districts of garlic along with production season are outlined as under:

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



Market Prices:

- Local supply of garlic is available, therefore its price is stable and even on lower side as compared to last year. Monthly average retail price of garlic in Punjab is Rs.179/Kg during month of January. The graph of monthly average retail price of garlic is given as under:



SUPPLY MANAGEMENT ADVISORY



Assessment

Currently, local supply of garlic is available along with its import from China, resultantly stability is being observed in the market price of garlic. With the arrival of new crop during March, 2026, its supply will further improve and prices will come in normal range.

Forecast

Due to availability of local crop along with smooth import, supply & price of garlic is likely to remain stable in local markets. However, during 1st week of Ramzan-2026, garlic prices may increase due to its high demand. Next production season of local garlic crop is likely to commence during the start of March 2026, afterwards garlic prices are likely to prevail within normal range in local markets.





Advisory



- The EADAs & Secretaries Market Committees should maintain close liaison with commission agents to ensure sufficient supply of local garlic in addition to its arrival from other provinces and smooth import from China to cater for consumption needs during month of Ramzan-2026.
- Auction proceedings of garlic in Agricultural Produce Markets be carefully supervised and transparency be ensured during fixation of prices.
- Processing of garlic into paste needs to be encouraged to maintain its availability round the year.



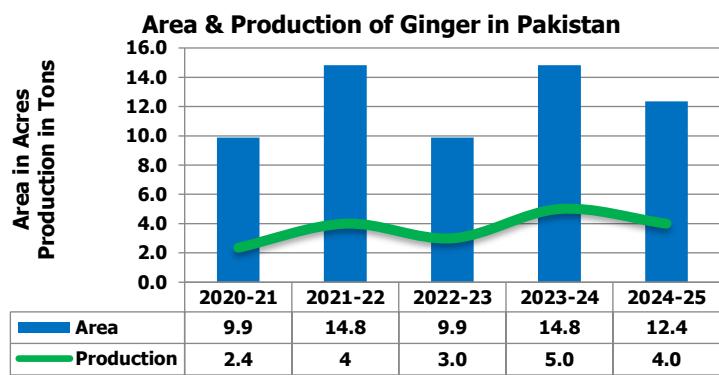
5. GINGER



NATIONAL OVERVIEW

Domestic Area & Production

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



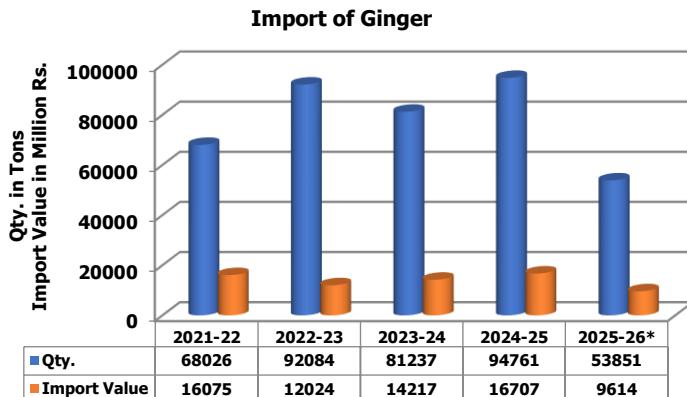
Domestic Production & Consumption:

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



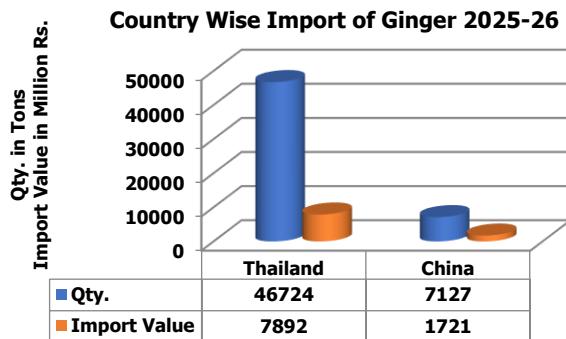
Import Insights

- During year 2024-25, ginger import was recorded at 94,761 tons of ginger, incurring an expenditure of Rs. 16,707 million. In year 2025-26 (July-December), import volumes reached 53,851 tons, with associated costs of Rs. 9,614 million, while Thailand and China remained the principal sources of import.
- During year 2025-26 (July-December), ginger imports from Thailand totalled 46,724 tons at an expense of Rs. 7,892 million, whereas imports from China amounted to 7,127 tons at a cost of Rs. 1,721 million.



*=Import during July 2025 to December 2025

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

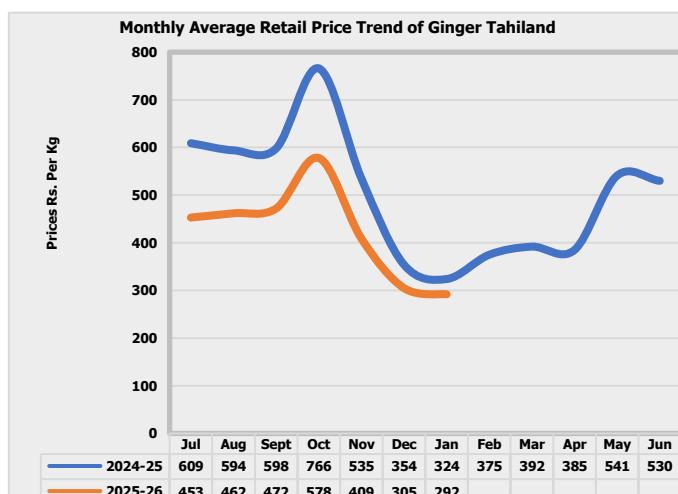
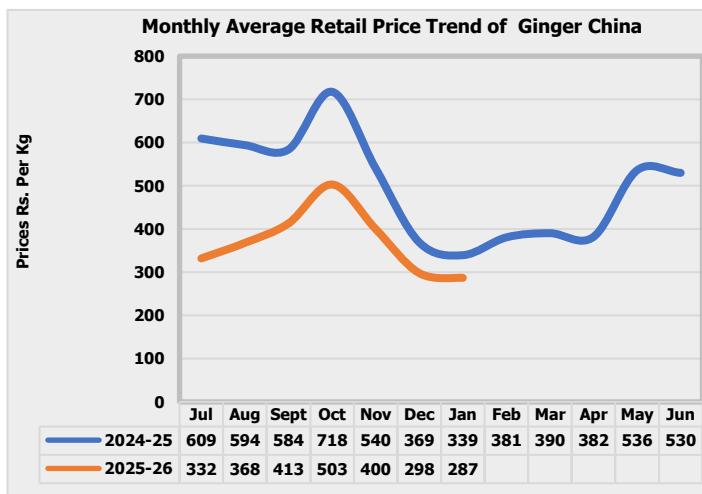


*=Import during July 2025 to December 2025

Source: Pakistan Single Window & Pakistan Bureau of Statistics

Market Prices

- Due to smooth import of ginger from Thailand & China, its supply situation is stable and its prices are exhibiting declining trend in local markets. The average monthly retail price of Thai ginger and Ginger China during month of January 2026 is recorded at Rs. 292/Kg and Rs.287/Kg, respectively. Trend lines for monthly average retail prices of Ginger Thai & Ginger China for current year and last year are outlined below:



SUPPLY MANAGEMENT ADVISORY



Assessment

With no meaningful domestic production, Pakistan remains entirely dependent on imports from Thailand and China to ensure the availability of ginger in local markets. As the production season is currently underway in both countries, import flows are smooth, resultantly ginger prices are on lower side in local markets.



Forecast

Production season of ginger in Thailand & China is in progress and import situation is smooth. Resultantly, supply & price situation of ginger is anticipated to remain stable in local markets. However, demand of ginger is likely to increase during month of Ramzan 2026, which may lead to slight increase in its prices.



Advisory



- EADAs and Secretaries of Market Committees should keep close coordination with local importers and commission agents to maintain smooth import of ginger from Thailand & China and also make arrangements for ensuring steady supply of ginger during month of Ramzan-2026.
- In a bid to avoid supply stress, processing of ginger into paste may be encouraged to maintain its availability round the year.
- The Agriculture Department should introduce such ginger seed varieties that are suitable for local climatic conditions, so that reliance on imports could be reduced.



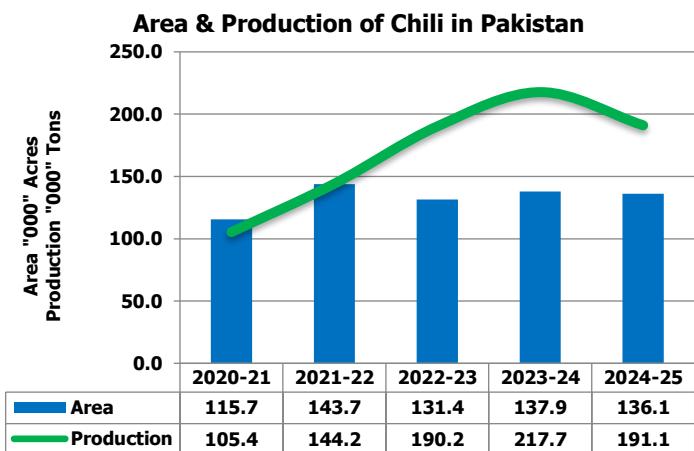
6. CHILLIES



NATIONAL OVERVIEW

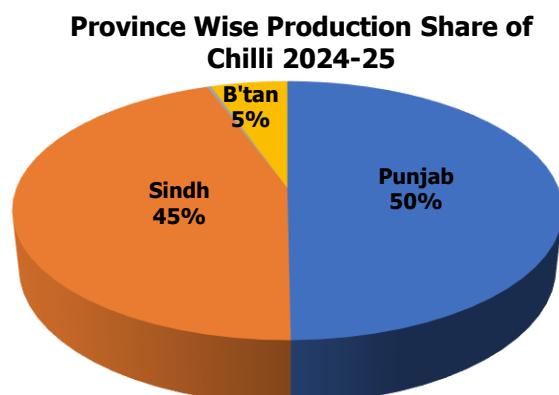
Domestic Area & Production

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



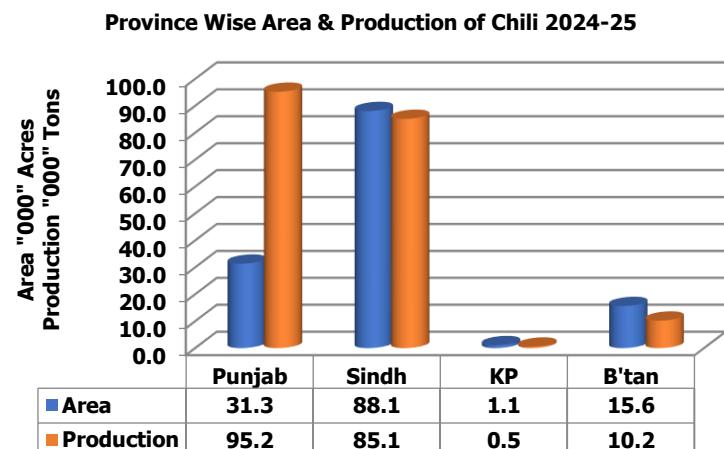
Province wise Area & Production

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





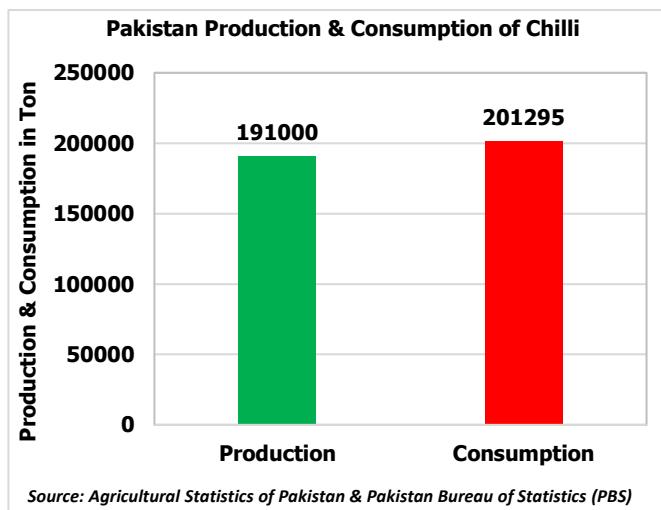
- Punjab stood as leading chili producing province in year 2024-25 by attaining production of 95,200 tons from a cultivated area of 31,300 acres. Sindh ranked second, producing 85,100 tons across 88,100 acres.
- Whereas, chili production in Balochistan and Khyber Pakhtunkhwa (KP) remained minimal, with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



Source: Agricultural Statistics of Pakistan

Domestic Production & Consumption:

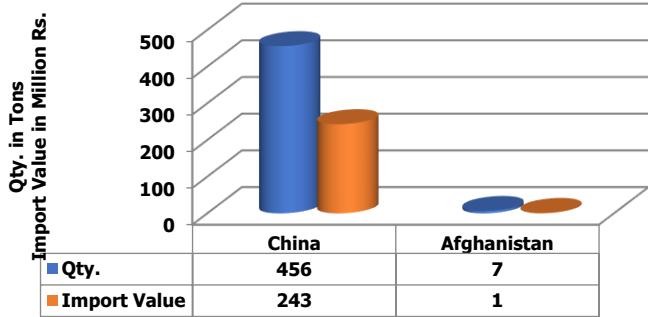
- During year 2024-25, domestic chili production amounted to 1,91,000 tons, which remained below the consumption requirement of 201,295 tons, resulting in a deficit of 10,295 tons.



Import Insights

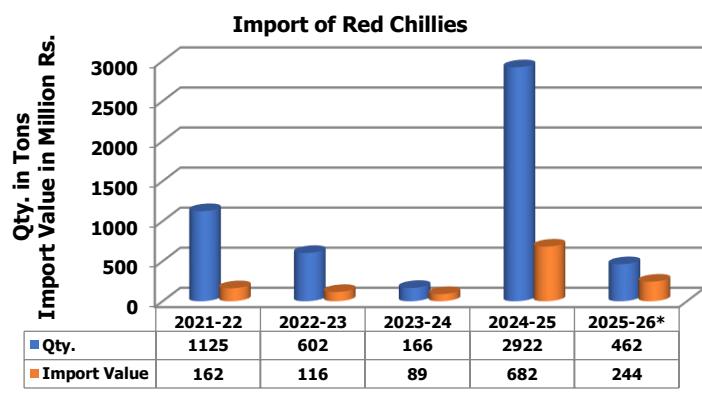
- During year 2024-25, red chili import in Pakistan was recorded at 2,922 tons at an expense of Rs. 682 million. During year 2025-26 (July-December), red chili imports registered at 462 tons, with associated cost amounting to Rs. 244 million.
- Pakistan mainly imports red chili from China. For year 2025-26 (July-December), import from China reached to 456 tons at a cost of Rs. 243 million, while only 7 tons were sourced from Afghanistan, costing Rs. 1 million.

Country Wise Import of Red Chillies 2025-26



*=Import during July 2025 to December 2025

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



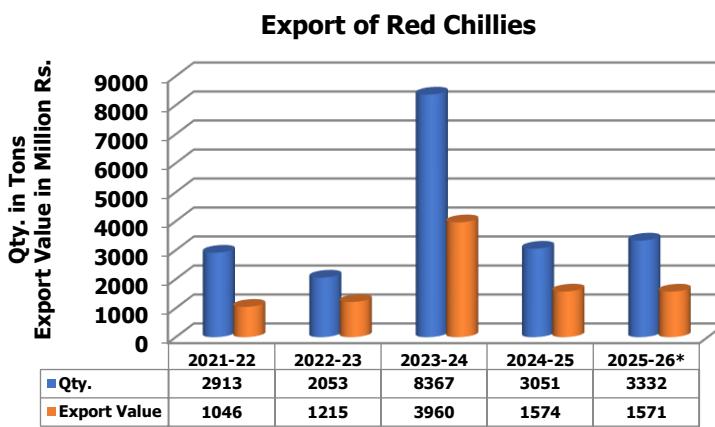
*=Import during July 2025 to December 2025

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



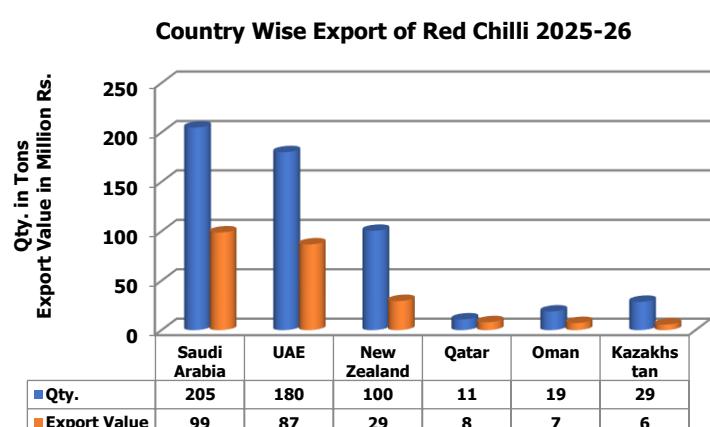
Export Insights

- In terms of both volume and value, Pakistan's red chili exports have consistently exceeded imports. During year 2024-25, export volumes were registered at 3,051 tons, generating revenue of Rs. 1,574 million, while in year 2025-26 (July-December) exports increased to 3,332 tons, yielding earnings of Rs. 1,571 million.
- Pakistani red chilies are primarily exported to Saudi Arabia, United Arab Emirates, New Zealand, Qatar, Oman and Kazakhstan.



*=Export during July 2025 to December 2025

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



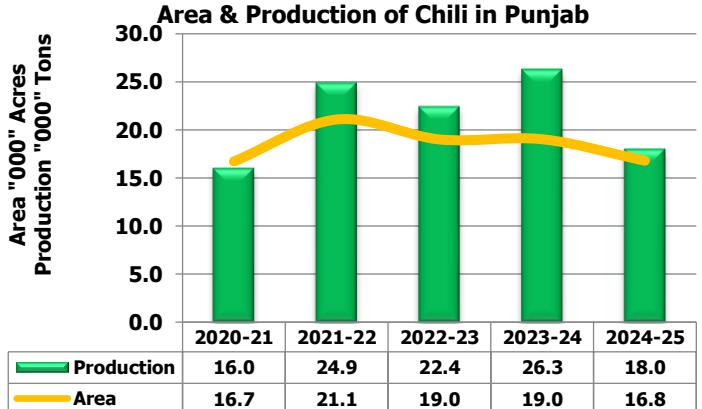
*=Export during July 2025 to December 2025

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

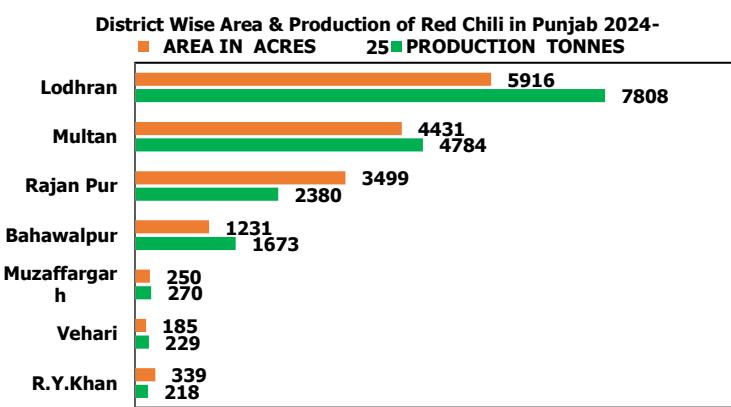
PROVINCIAL OVERVIEW

Area & Production

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



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



Source: Crop Reporting Service Punjab



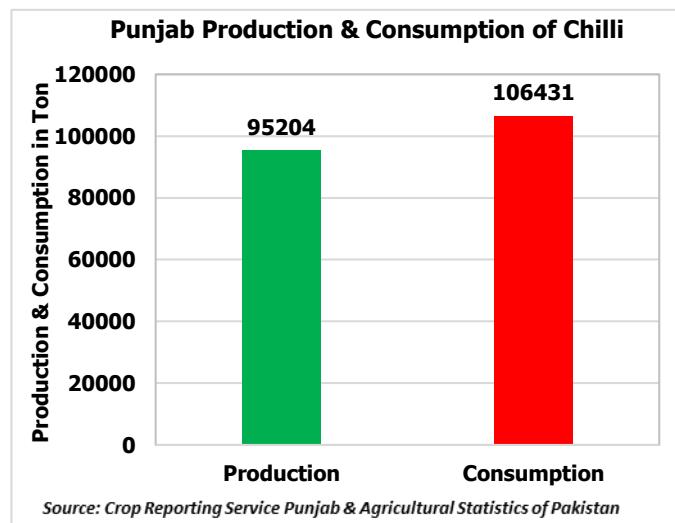
Food Safety and Consumer Protection Department



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

Provincial Production & Consumption:

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



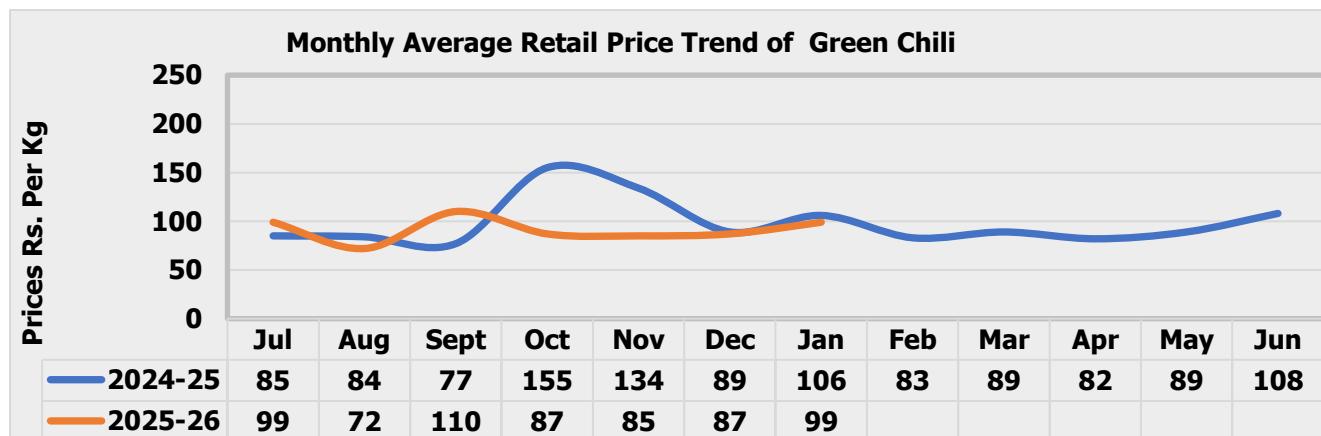
Supply Cycle

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

Province	Top Production Districts	Availability of Chilies Crop in Markets
Punjab	Lodhran, Multan, Rajanpur, Bahawalpur, Muzaffargarh, D.G. Khan & Vehari	July (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 Bugti	July-September

Market Prices

- Stable supply of chilies from Sindh has helped to keep green chili prices relatively steady in the local markets. In January, the monthly average retail price of green chilies in Punjab was recorded at Rs. 99 per kilogram. The graphical trend of monthly average retail prices of green chilies in Punjab is illustrated below:





SUPPLY MANAGEMENT ADVISORY



Assessment

Green chili supply is primarily sourced from Sindh. As a result of steady availability, prices of green chilies are exhibiting stable trend in local markets.

Forecast

Main supply of chilies is available from Sindh, which is likely to remain stable on account of 45% share of Sindh in total domestic production of chilies. During coming month of Ramzan-2026, demand of chilies will slightly increase which may also cause fluctuation in its prices.



Advisory



- EADAs and Secretaries Market Committees with the help of commission agents should maintain sufficient supply of chili from Sindh keeping in view consumption needs and also make plan to ensure stability in supply & price of green chilies even during Ramzan-2026.
- In order to ensure smooth availability of chilies, kitchen gardening may be promoted and encouraged within general public.
- The Agriculture Department should prioritize the development and promotion of high-yielding, climate-resilient and off-season seed varieties to enhance self-sufficiency and minimize dependence on other provinces.



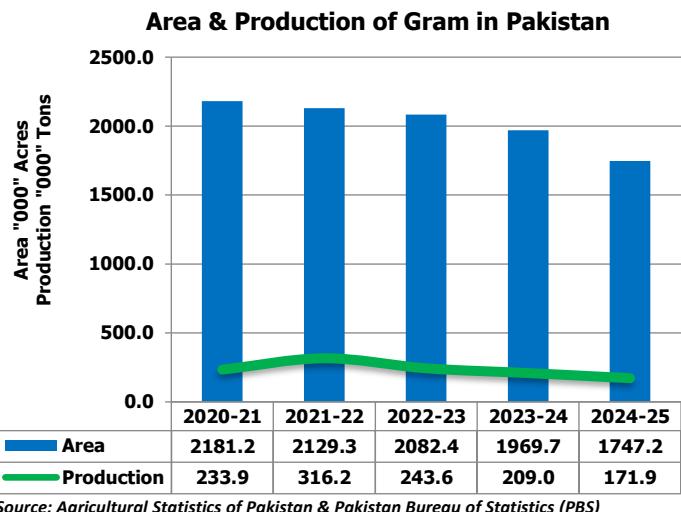
7. GRAM (Chickpea)



NATIONAL OVERVIEW

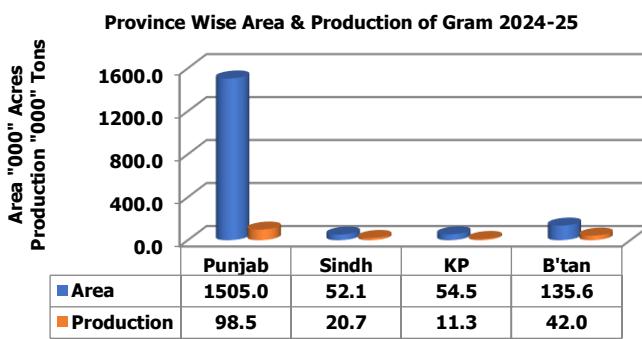
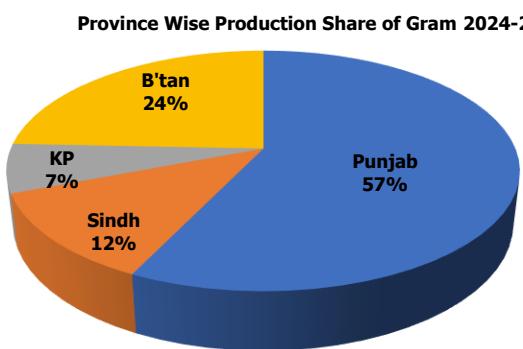
Domestic Area & Production:

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



Province wise Area & Production:

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

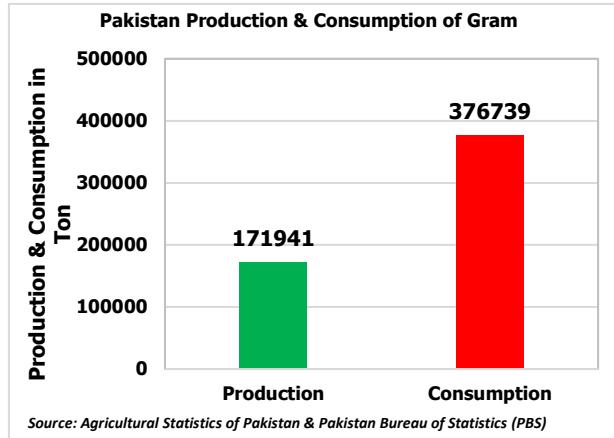


Source: Agricultural Statistics of Pakistan



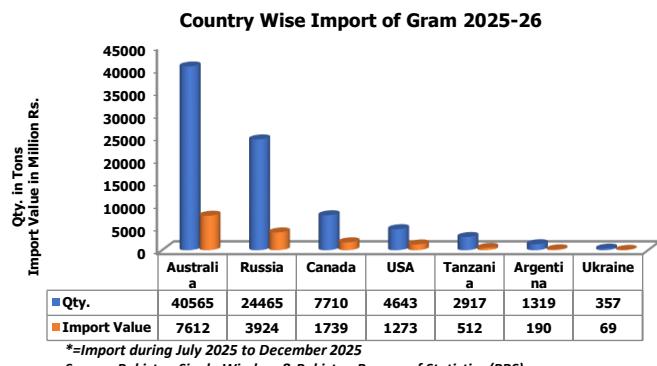
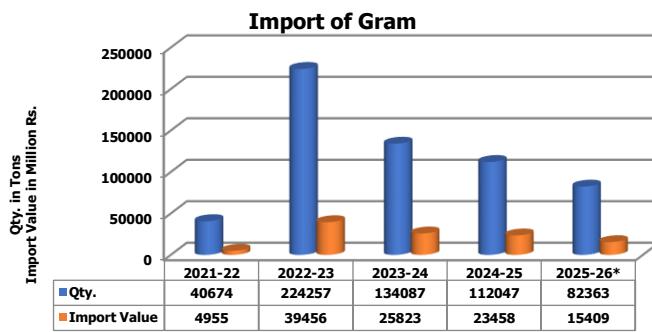
Domestic Production and Consumption:

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



Import Insights:

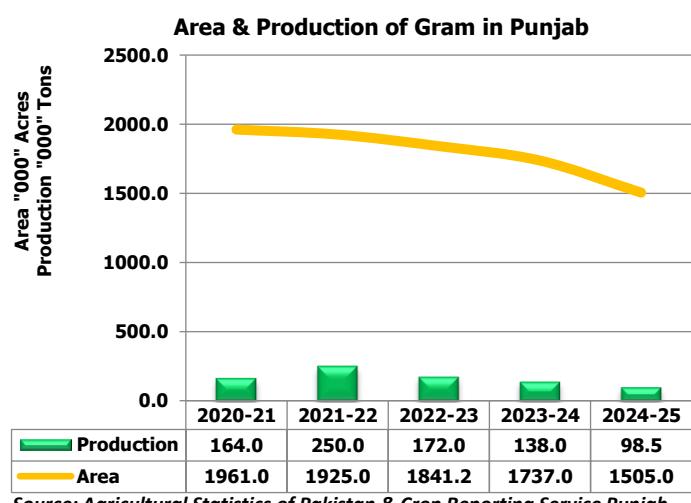
- During year 2024-25, gram import in Pakistan was registered at 112,047 tons at a total cost of Rs. 23,458 million, while during year 2025-26 (July-December) gram import reached 82,363 tons, with an expenditure of Rs. 15,409 million. The major sources of gram imports for Pakistan include Australia, Russia, Canada, the USA, Tanzania, Argentina and Ukraine.



PROVINCIAL OVERVIEW

Area & Production:

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





Food Safety and Consumer Protection Department



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

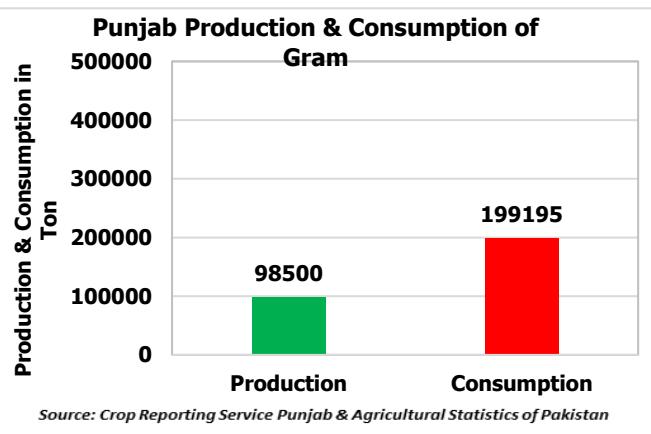
District Wise Area & Production of Gram in Punjab 2024-25

	AREA IN '000' ACRES	PRODUCTION '000' TONNES
Bhakkar	37.08	801.00
Layyah	15.26	224.70
Khushab	11.52	182.00
Jhang	9.69	193.05
Mianwali	48.55	6.74
Talagang	20.50	5.95
Taunsa	9.20	3.62

Source: Crop Reporting Service Punjab

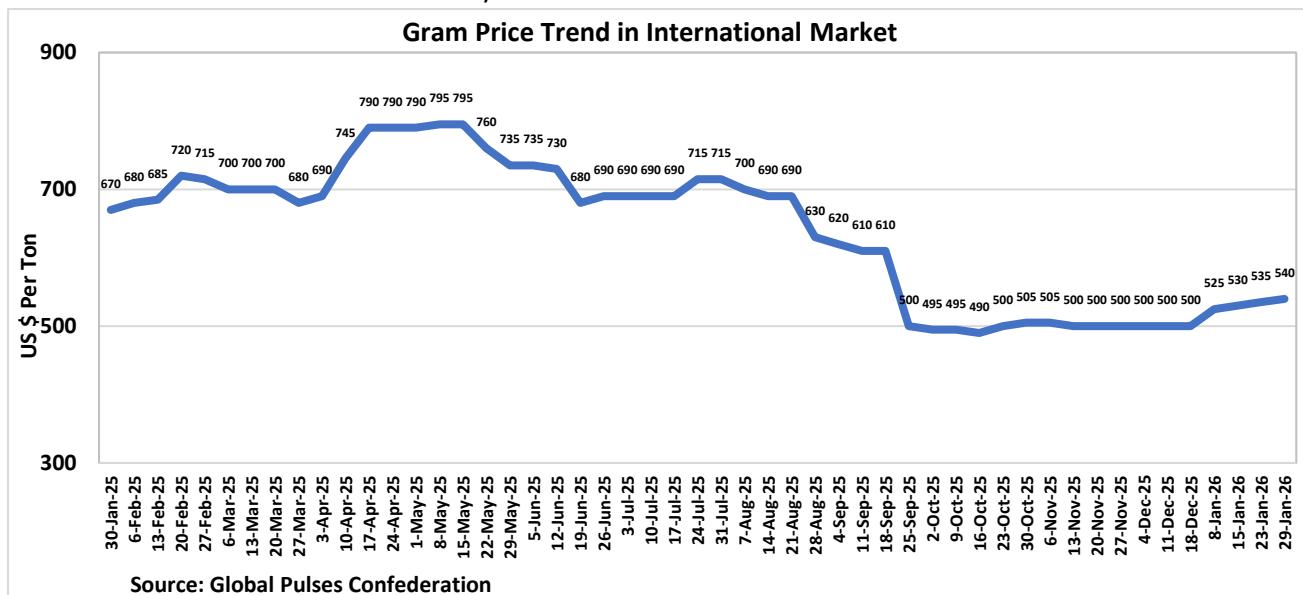
Provincial Production & Consumption:

- The provincial production of gram is recorded at 98,500 tons during year 2024-25, showing deficit of 1,00,695 tons as compared to provincial consumption requirement i.e. 1,99,195 tons.



International Market Trends

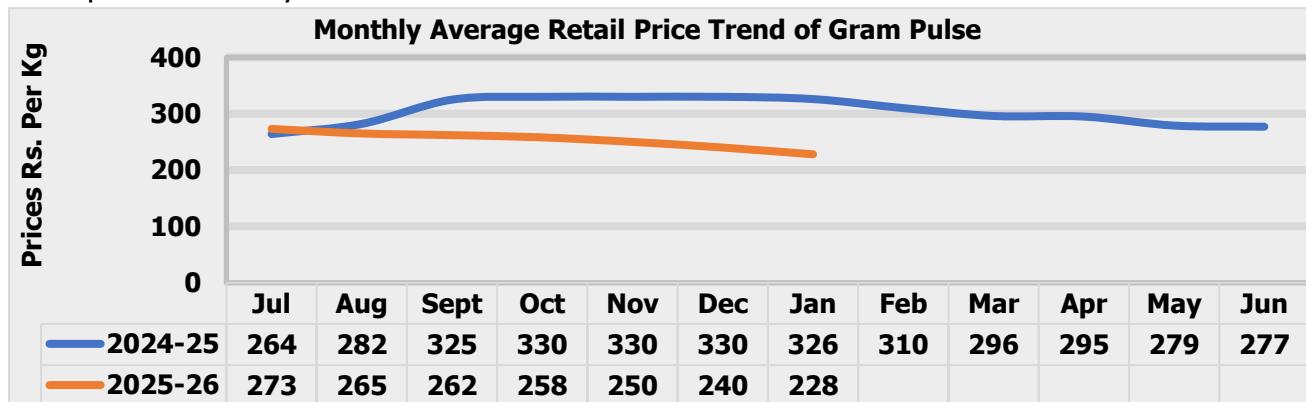
- International prices of gram have started to show slightly increasing trend, current international price of gram is USD 540/ton. The weekly price trends reported by the Global Pulse Confederation, is outlined below:





Local Market Price:

- Local prices of gram are showing stable trend due to its smooth import situation. In Punjab, the average monthly retail price of gram pulse recorded during month of January-2026 is Rs.228/Kg, which is far less than price recorded during corresponding period of last year.



SUPPLY MANAGEMENT ADVISORY



Assessment

Gram is being imported from Australia and Canada, previously its prices remained on very lower side which resulted in smooth import leading to stability in local markets of gram. However, during last three weeks slight surge in international prices is being observed, which may cause increase in local prices of gram.

Forecast

Import situation of gram remained smooth due to its previous low international prices. However, recent upward trend in international prices may lead to slight increase in prices of gram in local markets. Moreover, during month of Ramzan-2026 demand of gram/gram flour (basin) will increase manifolds which may lead to nominal increase in its market prices.



Advisory



- The District Administration with the assistance of concerned EADAs (E&M) and Secretaries Market Committees, should persuade commission agents and importers to ensure sufficient stocks of pulse to cater for consumption needs especially during Ramzan-2026.
- Moreover, stock taking exercise should also be performed keeping in view demand of Ramzan-2026.
- Price Control Magistrates should regularly inspect retailers and take strict measures to ensure true implementation of retail notified prices in local markets.



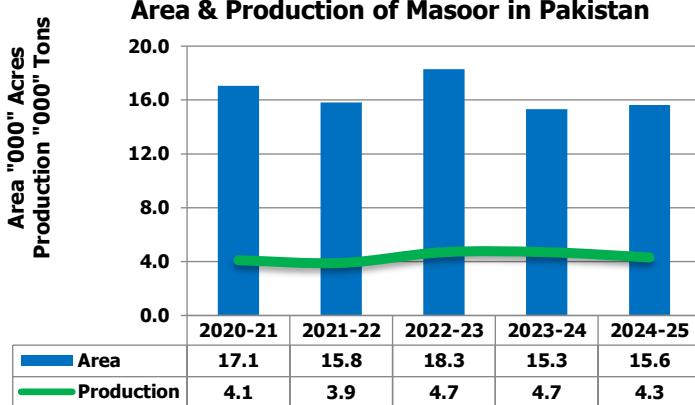
8. LENTIL (MASOOR)



NATIONAL OVERVIEW

Domestic Area & Production:

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

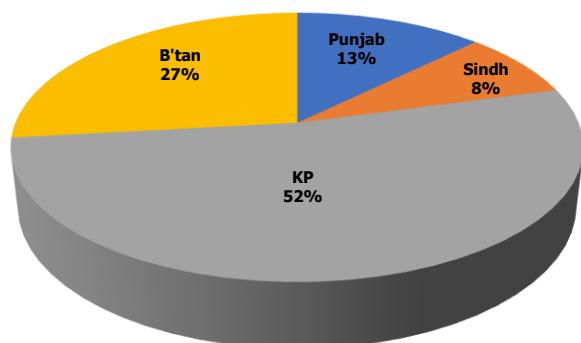


Source: Agricultural Statistics of Pakistan & Pakistan Bureau of Statistics (PBS)

Province wise Area & Production:

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

Province Wise Production Share of Masoor 2024-25

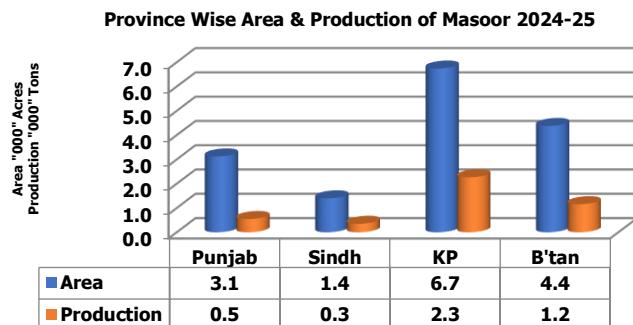




Food Safety and Consumer Protection Department



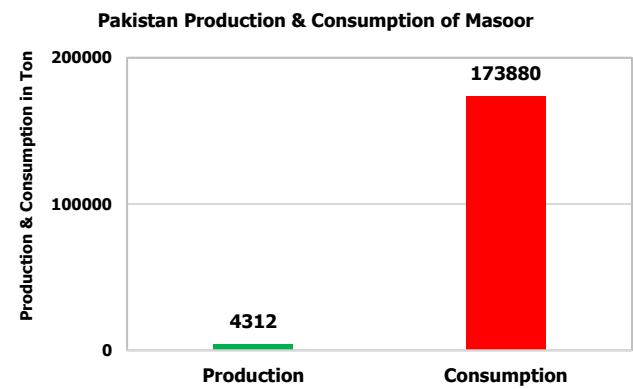
- In year 2024-25, masoor production in Khyber Pakhtunkhwa (KP) amounted to 2,300 tons harvested from 6,700 acres. Balochistan secured the second position with an output of 1,200 tons, while Punjab produced 500 tons and Sindh recorded 300 tons.



Source: Agricultural Statistics of Pakistan

Domestic Production & Consumption

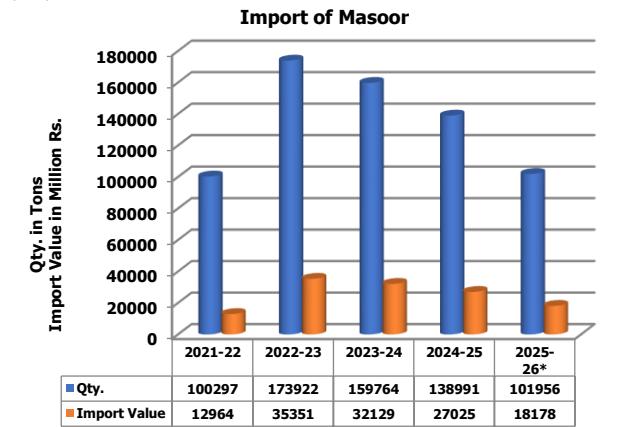
- A wide gap between production and demand was evident in year 2024-25, as domestic masoor output totaled only 4,312 tons against a national consumption requirement of 173,880 tons, resulting in a substantial deficit of 169,568 tons.



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

Import Insights

- To bridge the gap between domestic supply and consumption needs, Pakistan imported 138,991 tons of masoor during 2024-25 at a cost of Rs. 27,025 million, reflecting a decline in both volume and value compared to the previous year. In 2025-26 (July-December), masoor imports amounted to 101,956 tons, involving an expenditure of Rs. 18,178 million.
- Masoor imports are primarily sourced from Canada, Australia, Ukraine, and Afghanistan, with the majority of supplies originating from Canada and Australia, while contributions from Ukraine and Afghanistan remain comparatively limited.
- During year 2025-26 (July-December), imports from Canada totalled 61,823 tons at a cost of Rs. 11,047 million, whereas Australia supplied 35,932 tons, valued at Rs. 6,416 million.



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



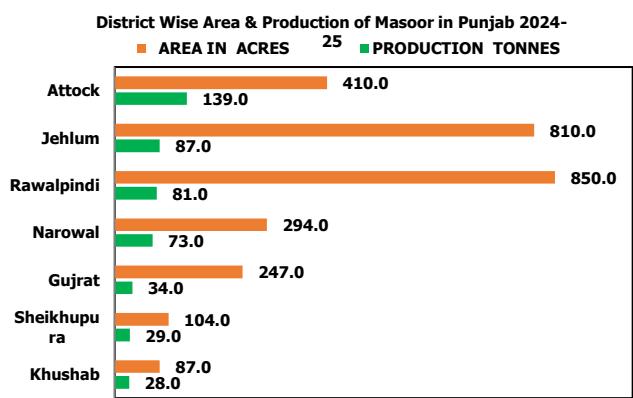
*=Import during July 2025 to December 2025
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)



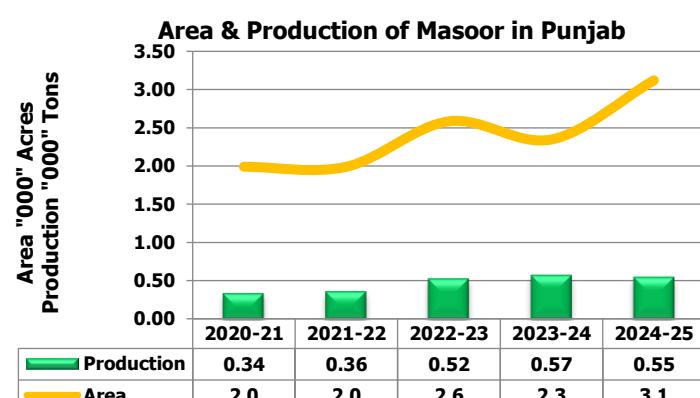
PROVINCIAL OVERVIEW

Area & Production:

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



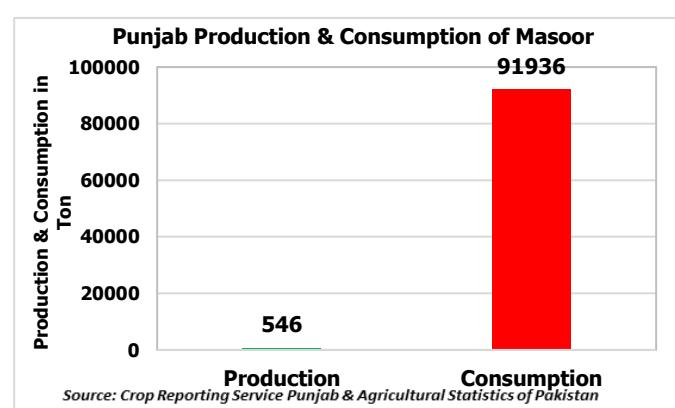
Source: Crop Reporting Service Punjab



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

Provincial Production & Consumption:

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

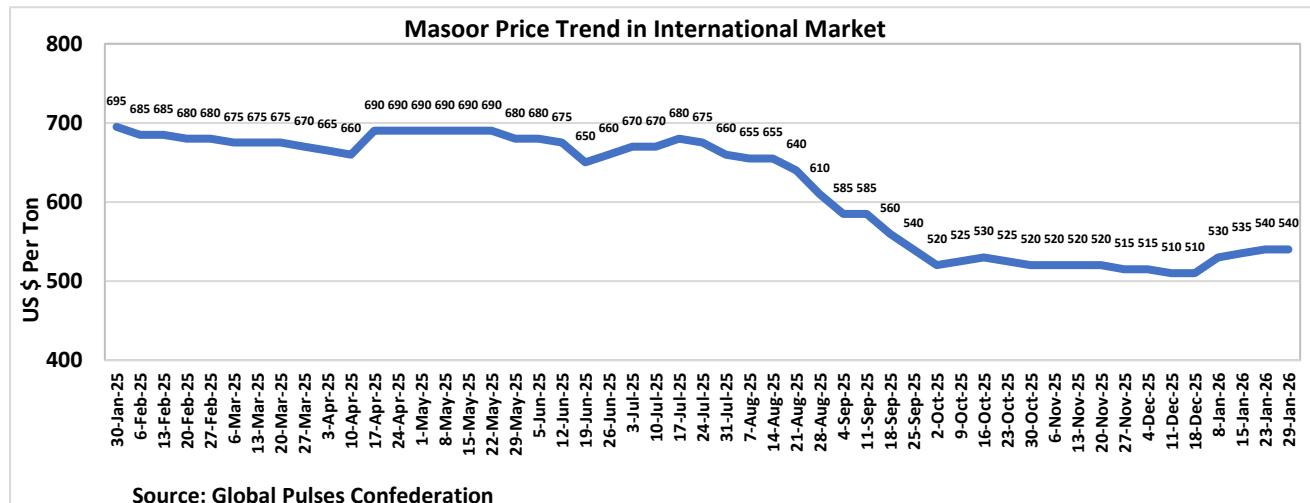


Source: Crop Reporting Service Punjab & Agricultural Statistics of Pakistan



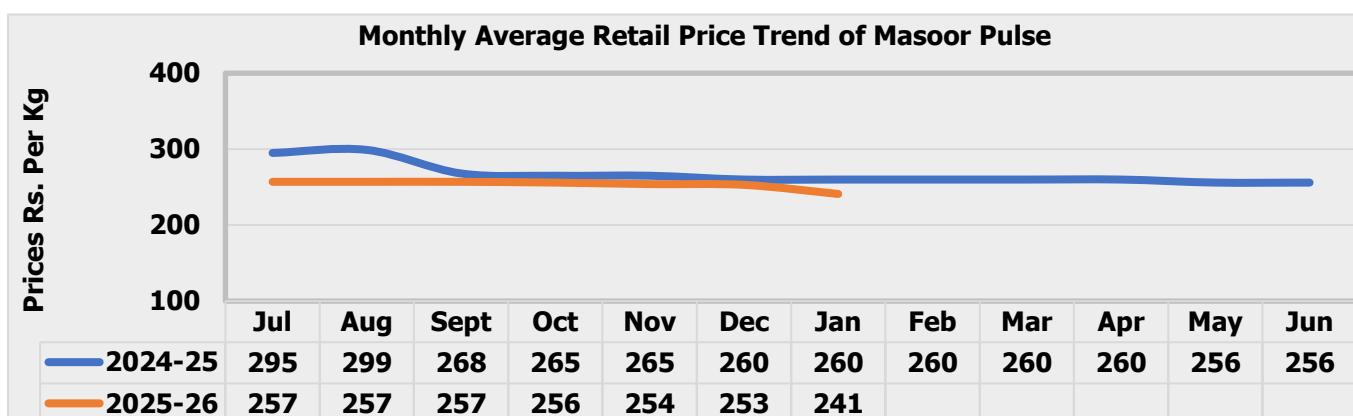
International Market Trend:

During last four weeks, international prices of masoor are exhibiting slightly increasing trend and current international prices of maoor are USD 540/ton. The weekly trend in global masoor prices, as reported by the Global Pulse Confederation, is illustrated below



Local Market Price:

- As import situation of masoor is smooth, therefore supply & price situation of masoor is showing stable trend in local markets. In Punjab, the average monthly retail price of masoor recorded during month of January is Rs. 241/Kg.



SUPPLY MANAGEMENT ADVISORY



Assessment

The domestic production of masoor is quite negligible due to which import is imperative to meet domestic requirements. Due to low international prices of masoor, its import in the country is steady and resultantly its prices are exhibiting stable trend in local markets. However, recently slight increase in international prices of masoor is being observed, it may cause some increase in its local prices.



Forecast

Due to low international prices, import situation of masoor remained stable. However, international prices are experiencing increasing trend from last three weeks, if surge in international prices persists, it may also lead to increase in its local prices. However, during month of Ramzan 2026 impact on supply of masoor will not be significant due to its normal demand.



Advisory



- The District Administration, with the help of concerned EADAs (E&M) and Secretaries Market Committee, should conduct regular meetings with commission agents, importers and dealers to ascertain current supply situation and also take well in time measures to keep supply & price situation of masoor smooth even during month of Ramzan-2026.
- Price Control Magistrates should keep regular surveillance of retailers and ensure that notified prices are truly implemented in the markets.



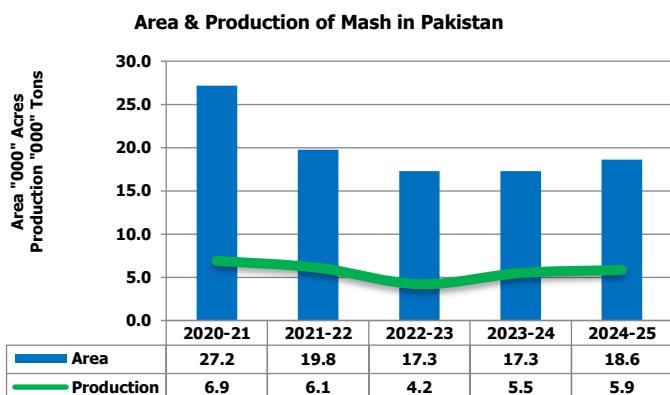
9. MASH



NATIONAL OVERVIEW

Domestic Area & Production:

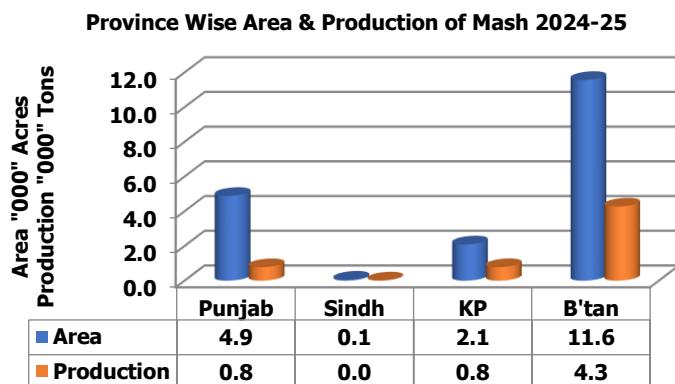
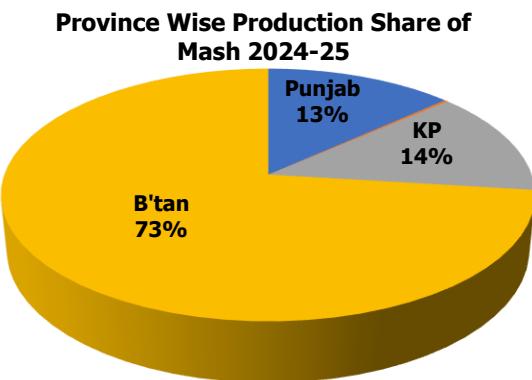
- Extremely limited domestic production of mash has compelled Pakistan to rely on imports for nearly 94% of its total consumption requirements.
- A gradual upward movement in both cultivated area and production has been observed over the past three years. In year 2024-25, mash cultivation expanded to 18,600 acres, registering a 7.51% increase compared with the previous year.
- Alongside this expansion, national mash production rose to 5,850 tons, reflecting a 6.36% increase from the 5,500 tons recorded in the preceding year.



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

Province wise Area & Production:

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

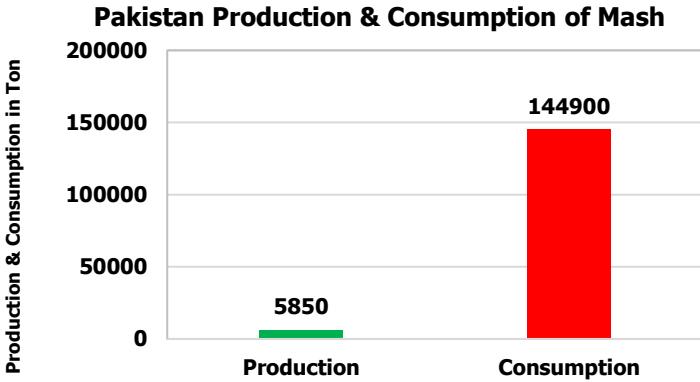


Source: Agricultural Statistics of Pakistan



Domestic Production & Consumption:

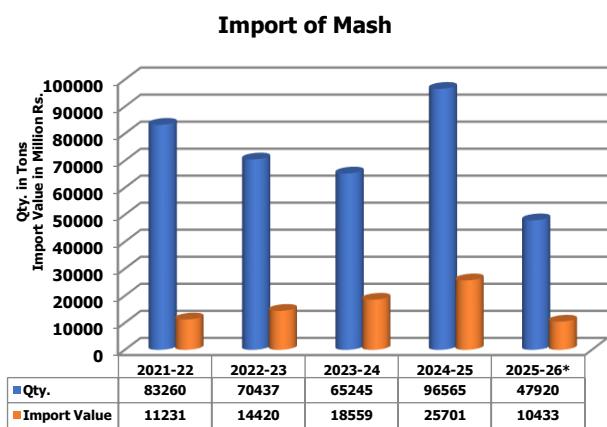
- During year 2024-25, domestic mash production was limited to just 5,850 tons, compared with a national consumption requirement of 144,900 tons, resulting in a substantial supply deficit of 139,050 tons.



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

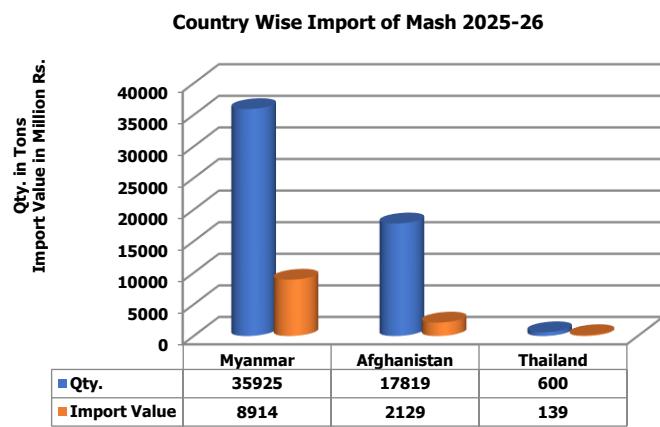
Import Insights:

- Owing to limited domestic output, Pakistan continues to rely heavily on mash imports to meet national consumption needs. In year 2024-25, mash imports amounted to 96,565 tons, with an associated expenditure of Rs. 25,701 million. During year 2025-26 (July-December), import volumes reached 47,920 tons, incurring a cost of Rs. 10,433 million.
- The majority of mash imports are sourced from Myanmar, Afghanistan and Thailand, with Myanmar and Afghanistan serving as the principal suppliers. In year 2025-26 (July-December), imports from Myanmar totalled 32,925 tons, while 17,819 tons imported from Afghanistan and imports from Thailand remained minimal at 600 tons.



*=Import during July 2025 to December 2025

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



*=Import during July 2025 to December 2025

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

PROVINCIAL OVERVIEW

Area & Production:

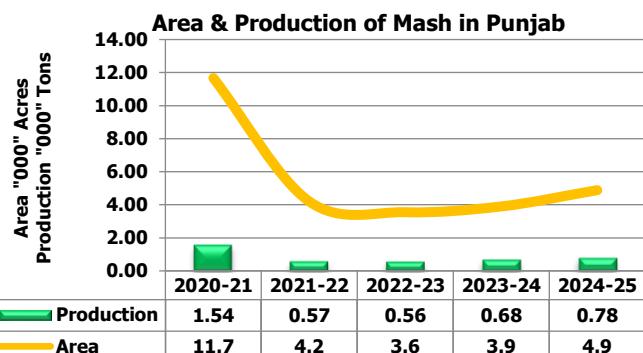
- A modest but steady improvement has been observed in Punjab's mash cultivation and production over the last three years. In year 2024-25, provincial production of mash increased to 780 tons, registering a 14.7% rise compared with the previous year, while the cultivated area expanded to 4,900 acres,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



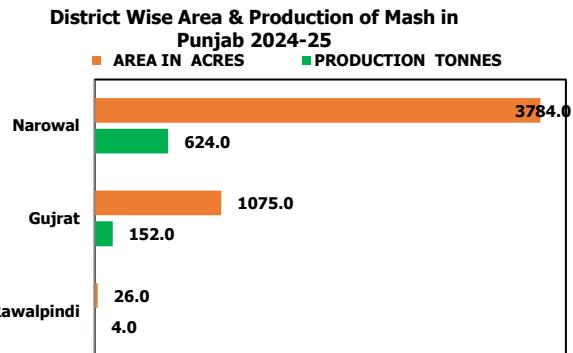
Food Safety and Consumer Protection Department



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



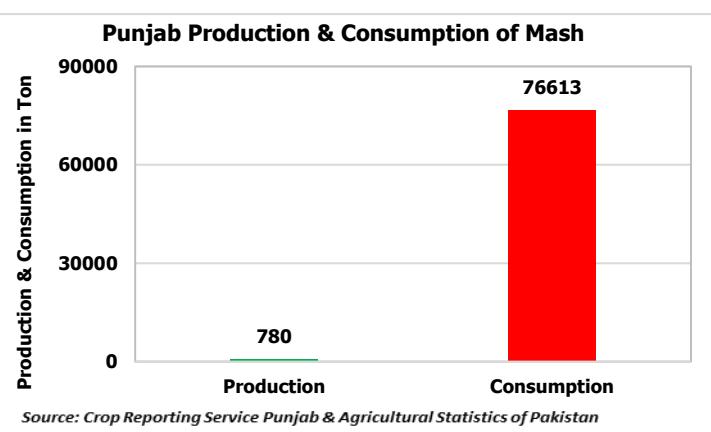
Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



Source: Crop Reporting Service Punjab

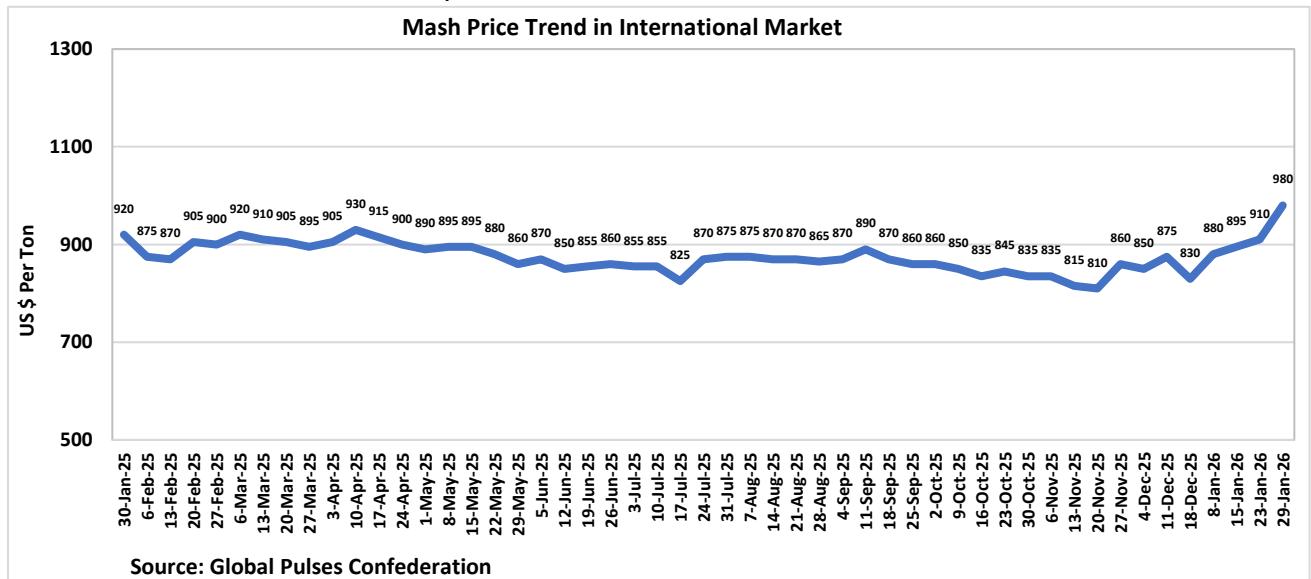
Provincial Production and Consumption:

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



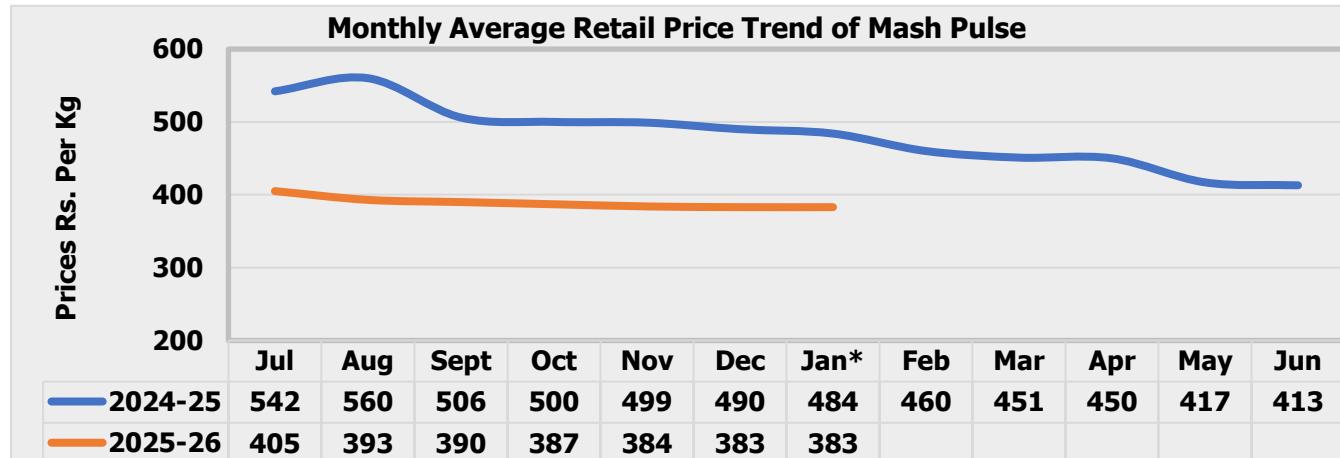
International Market Trend:

International prices of mash are continuously increasing during last four weeks, which has reached at USD 980/ton.



Local Market Price:

Local prices of mash are showing almost stable trend as a result of its steady import situation. Monthly average retail price of mash in Punjab is recorded at Rs.383/kg during month of January-2026, which is far less than last year's price.



SUPPLY MANAGEMENT ADVISORY



Assessment

Extremely low domestic production of mash has made country heavily dependent on its import to meet consumption needs. Previously low international prices have facilitated smooth import flows, and as a result, both the supply and price of mash are exhibiting a stable trend in local markets. However, recently international prices have started to show increasing trend which may also be reflected in local prices of mash.

Forecast

As upward trend in international prices of mash is being observed, therefore prices of mash are likely to increase in local markets. Moreover, consumption of mash is expected to increase during the month of Ramzan-2026 due to its high use in Dahi bhally and golgappas etc, resultantly its price will increase in local markets.



Advisory



- The District Administration with the help of concerned EADA and Secretaries Market Committee should persuade traders / importers to undertake regular & sufficient import of mash and do all efforts to meet demand of Ramzan 2026.
- Price Control Magistrates (PCMs) should keep regular check on retailers and take strict measures to ensure implementation of notified retail prices.

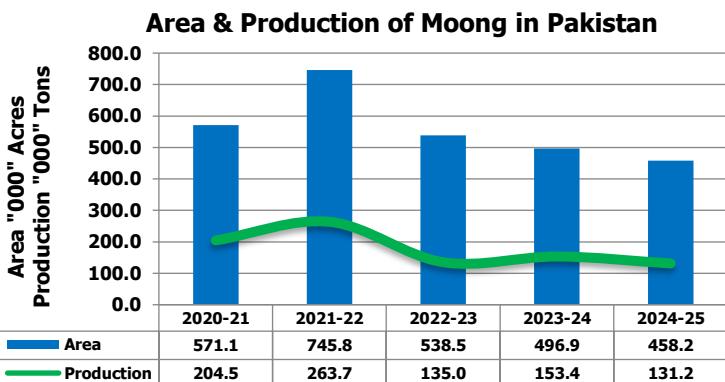


10. MOONG



Domestic Area & Production

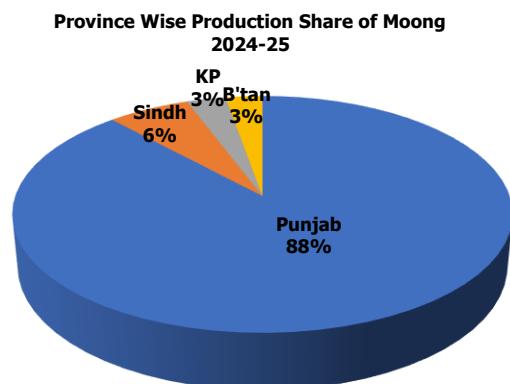
- The domestic cultivation of moong has shown continuously declining trend over last four year and domestic production has also remained unstable even declining during this period.
- During year 2024-25, area under cultivation of moong in the country has been recorded at 4,58,200 acres, showing 7.78%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



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

Province wise Area & Production:

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

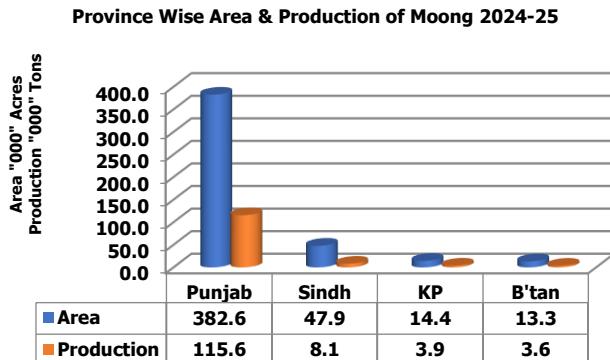




Food Safety and Consumer Protection Department



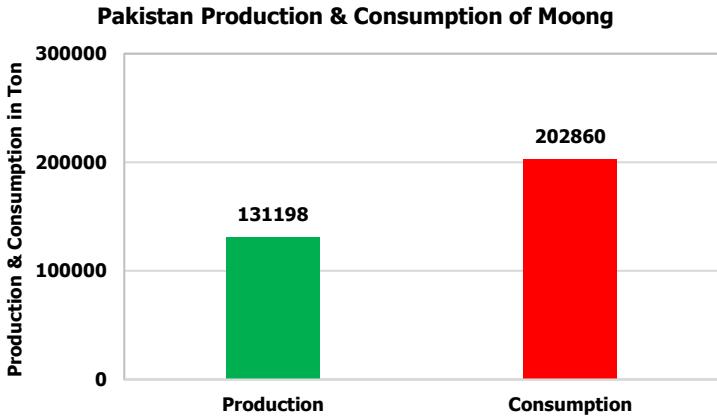
- Punjab emerged as the top moong-producing province in year 2024-25, producing 115,600 tons from 382,600 acres.
- Sindh followed with 8,100 tons, Khyber Pakhtunkhwa produced 3,900 tons, and Balochistan recorded the lowest production at 3,600 tons.



Source: Agricultural Statistics of Pakistan

Domestic Production & Consumption:

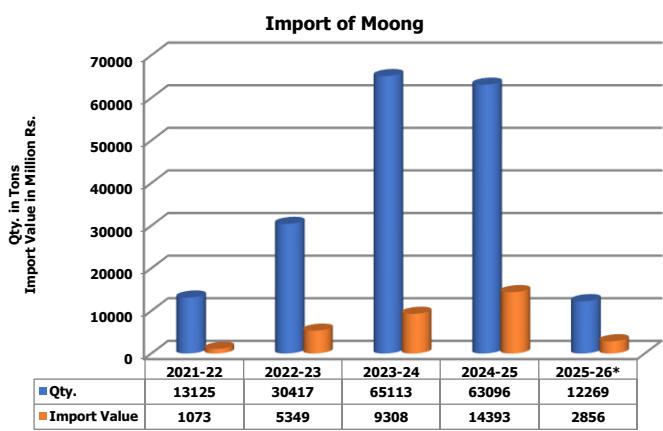
- During year 2024-25, Pakistan's domestic moong production reached 131,198 tons, falling short of the national consumption requirement of 202,860 tons and resulting in a supply deficit of 71,662 tons.



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

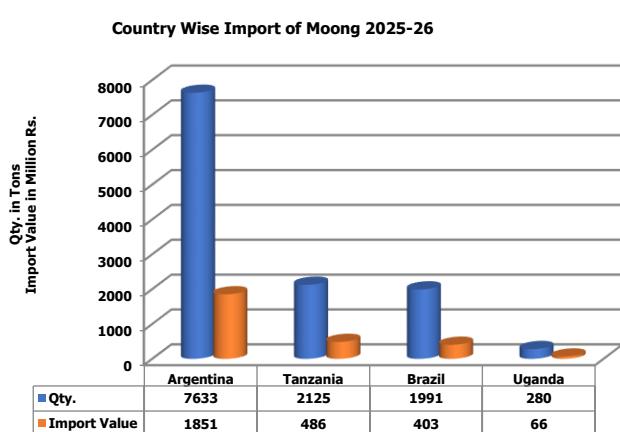
Import Insights:

- 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-December), imports reached 12,269 tons, at an expense of Rs. 2856 million.
- Pakistan primarily sources moong imports from Argentina, Tanzania, Brazil and Uganda.



*=Import during July 2025 to December 2025

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



*=Import during July 2025 to December 2025

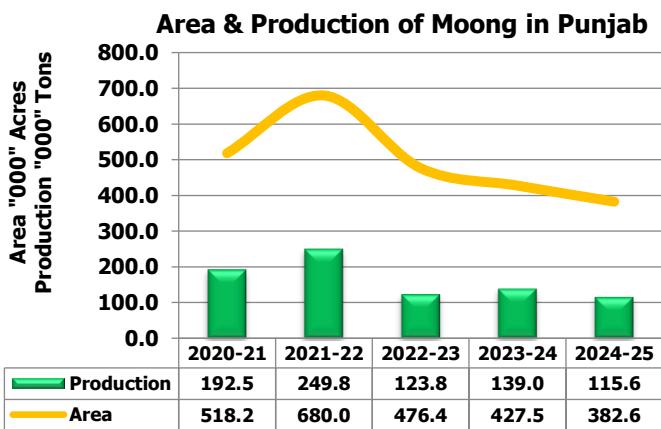
Source: Pakistan Single Window & Pakistan Bureau of Statistics (PBS)



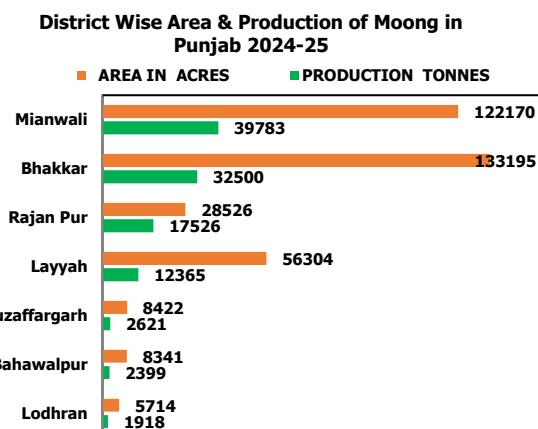
PROVINCIAL OVERVIEW

Area & Production:

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



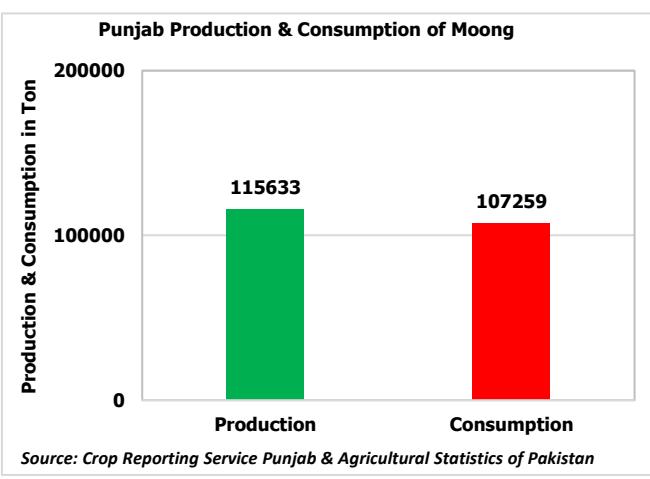
Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab



Source: Crop Reporting Service Punjab

Provincial Production & Consumption:

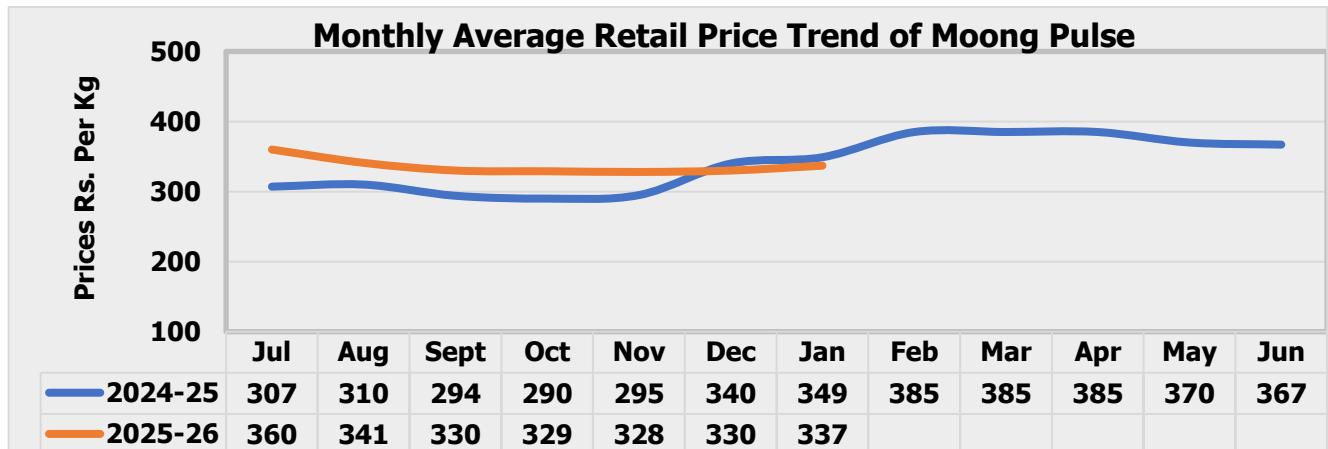
- During year 2024-25, provincial production of moong appeared to be 1,15,633 tons, showing surplus of 8374 tons as compared to provincial consumption requirement i.e. 1,07,259 tons.



Source: Crop Reporting Service Punjab & Agricultural Statistics of Pakistan

Market Prices

- The availability of the local moong crop has contributed to a stable supply and price situation in local markets. However, since the overall production is not abundant, prices have not declined significantly. In January 2026, the monthly average retail price of moong in Punjab was recorded at Rs. 337 per kilogram. The trend of monthly average retail prices for moong is presented below:



SUPPLY MANAGEMENT ADVISORY



Assessment

Moong prices in local markets are exhibiting stable trend due to the availability of the local crop. However, limited production has prevented any significant decline in prices.

Forecast

Due to availability of local crop, price of moong is likely to remain stable in local markets. However, during Holy month of Ramzan-2026, its prices may fluctuate due to increase in its demand.



Advisory



- District Administration with the help of concerned EADA and Secretaries Market Committees must remain in close liaison with commission agents/traders to ensure sufficient & sustained supply of moong and also take measures to avoid any shortage during Ramzan-2026.
- Price Control Magistrates are required curb overcharging and profiteering practices by taking strict actions against offenders.

The End