



**September
2025**

FOOD IN FOCUS

Market Analysis Report



**Price Control and Commodities
Management Department**



Price Control & Commodities Management Department



PREFACE

The Department of Price Control and Commodities Management is pleased to present the eleventh 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, PAMRA Authority and Agriculture Department, 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.



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ABSTRACT

This report is prepared on the basis of data available from Food and Agriculture Organization, World Bank, Pakistan Bureau of Statistics (PBS), Agriculture Statistics of Pakistan 2023-24, Economic Survey of Pakistan 2024-25, FBR, Global Pulses Confederation (GPC), Crop Reporting Service Punjab and Market Committees in the Punjab. This bulletin has major emphasis on production, supplies, prices, imports, exports, international prices, and local prices to have deep useful insights regarding current scenario as well as future trends of local markets. A concise overview of this report highlights that lean production season is prevailing in Punjab for major vegetables i.e. tomato, onion & potato. Thus, their supplies are dependent on arrival from other provinces especially Balochistan. Recent rainfalls and floods have sharply affected supplies from KP and somewhat in Balochistan, which necessitates import from Afghanistan & Iran particularly in tomato. Seriatim detail of major vegetables, minor vegetables and pulses is as under:

- **Potato** has stable supply situation due to its significant local production. Main supply is arriving from cold stores thus price of potato store is on higher side due to inclusion of storage cost. Fresh supply is arriving from KP in very less quantum, resultantly price of potato fresh is comparatively higher in local markets.
- In case of **Tomato**, local supply is not available, thus its supply is dependent is on other provinces i.e. Balochistan & KP. However, supply from KP has diminished due to recent rainfalls & floods and somewhat is also affected from Balochistan. Resultantly, reliance on import is increasing and prices are trending on higher side. Thus, smooth import of tomato from Afghanistan and Iran is required for keeping stable supply in local markets.
- Likewise, **Onion** is also mainly sourced from Balochistan & KP. Sufficient supply of onion is arriving from Balochistan, thus supply is stable. However, recent rainfalls and floods affected its supply in KP and somewhat in Balochistan, thus its price is showing slightly increasing trend in local markets.
- As regards **Pulses**, currently production season of Gram, Mash and Masoor is dormant and their local production also appeared to be far less in contrast with their consumption requirements. Thus, their supply is heavily reliant on import. Fortunately, international prices of pulses have sharply decreased, resultantly import is smooth and prices are showing stable trend in local markets. In case of Moong, its local production season is in progress, which improved supply situation and set its price to decline in local markets.

Advisory Measures:

- Depending upon major supply of tomato from Balochistan and Afghanistan, PAMRA Authority should coordinate with Ministry of National Food Security & Research and Ministry of Commerce to ensure smooth import from Afghanistan as well as Iran. Moreover, supply from Balochistan may also be increased with the help of commission agents to meet consumption requirements.
- Moreover, international prices of pulses are on lower side. Therefore, DCs should ensure this decline to be apparent in local prices while fixing prices through DPCC meeting for the relief of common man. District Administration especially Commissioner Faisalabad may encourage importers to undertake maximum import as per consumption needs of the province.
- Agriculture Department should keep focusing on expansion area under cultivation of major vegetables and pulses to upscale local production by introducing high yielding and climate resistant seed varieties.

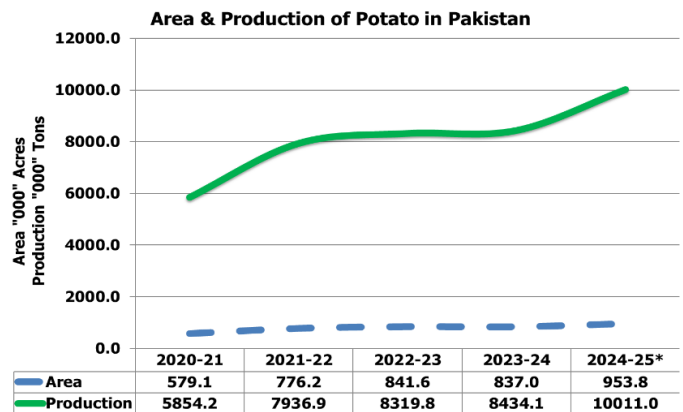


1. Potato



NATINAL OVERVIEW

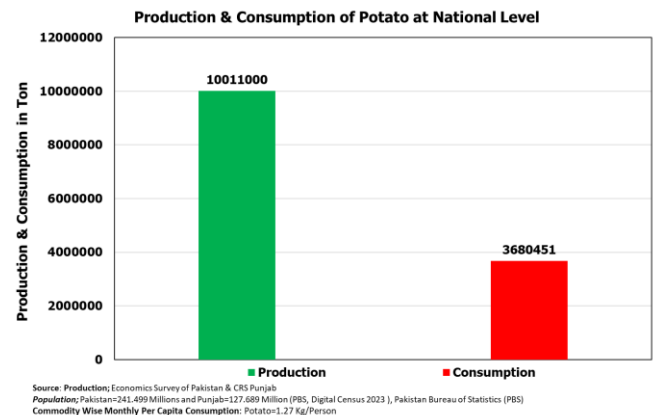
- Pakistan is self sufficient to meet domestic consumption requirement of potato as a result of significant domestic production of potato. The surplus potato production not only serves consumption requirements but also helps country to earn foreign exchange through its export.
- As per Agricultural Statistics of Pakistan and Economic Survey of Pakistan 2024-25, estimated domestic production of potato has been recorded at 10.011 million tons, representing a record-high output and indicating an 18.70% increase over the previous year.
- Over the past five years, both the area under cultivation and the overall production volume have demonstrated a steady upward trajectory, underscoring the crop's growing significance in Pakistan's agricultural economy.



*=Provisional

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

- As per the Household Integrated Economic Survey 2018-19 conducted by the Pakistan Bureau of Statistics and reported in the Agriculture Statistics of Pakistan, the country's domestic potato consumption is estimated at 3,680,451 tons.
- During the year 2024-25, Pakistan's potato production has been estimated at 10,010,773 tons, sufficiently fulfilling the domestic consumption requirements.



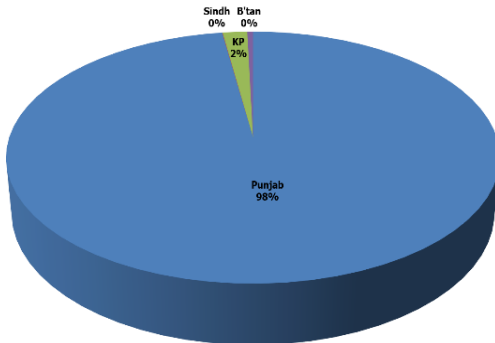


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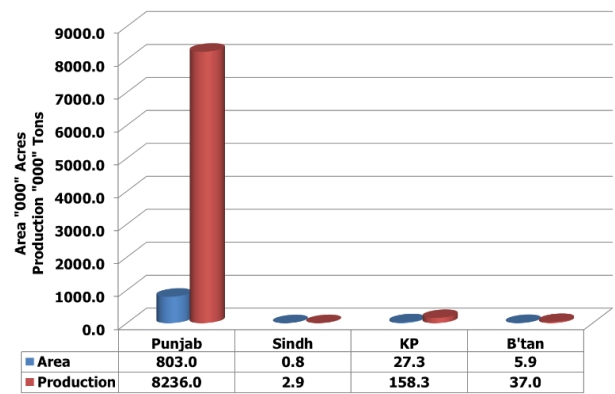


- Punjab stands as the dominant contributor to national potato production, accounting for 98 percent of the total output, while all other provinces collectively contribute only 2 percent. During 2023–24, potato cultivation in Punjab covered 803,000 acres, producing a total of 8.236 million tons.

Province Wise Production Share of Potato 2023-24



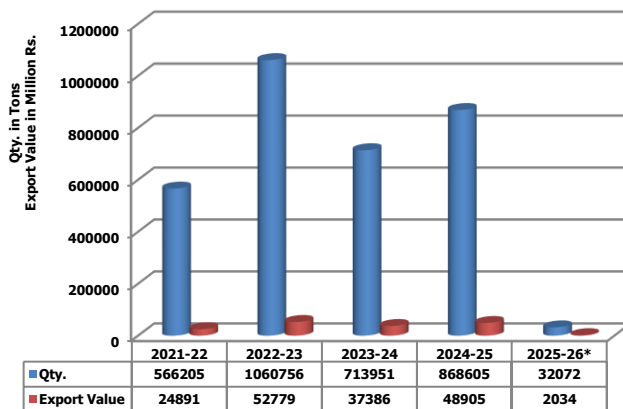
Province Wise Area & Production of Potato 2023-24



Source: Agricultural Statistics of Pakistan

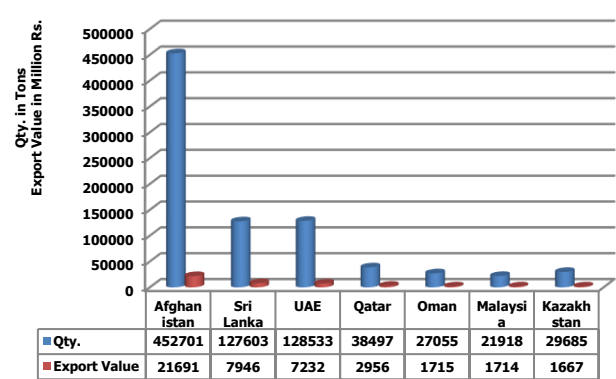
- Owing to surplus production, Pakistan has established itself as a significant global exporter of potato. In the fiscal year 2024–25, the country exported 8,68,605 tons, generating export earnings of Rs. 48,905 million. During year 2025–26 (July), export has been recorded at 32072 tons, yielding Rs. 2034 million in revenue. Major export destinations include Afghanistan, Sri Lanka, the United Arab Emirates, Qatar, Malaysia & Kazakhstan.

Export of Potato



Source: PBS & Pakistan Single Window

Country Wise Export of Potato 2024-25



Source: Pakistan Single Window

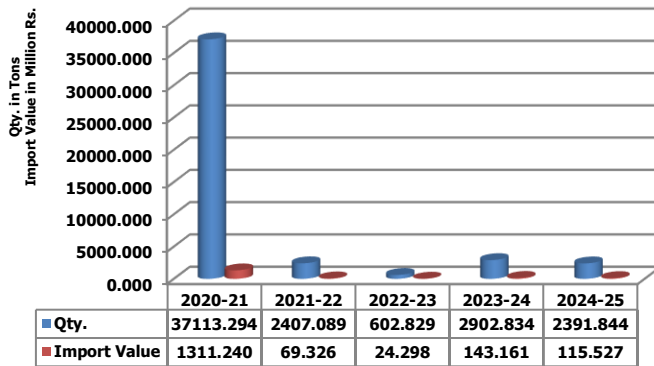


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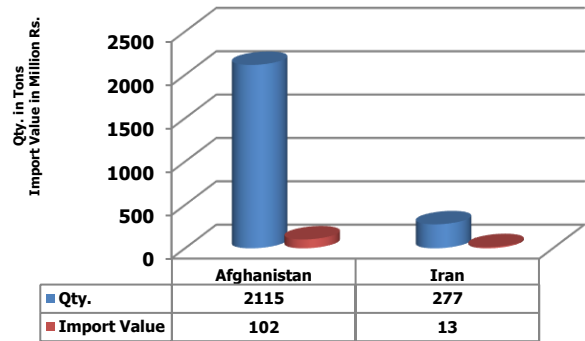
- Given the adequacy of domestic production, Pakistan has no requirement to import potato for consumption. However, a limited volume is imported solely for seed purpose. During year 2024–25, import was recorded at 2392 tons, whereas during year 2025–26 (July) no import has been recorded. Pakistan primarily imports potato from Afghanistan and Iran.

Import of Potato



Source: PBS & Pakistan Single Window

Country Wise Import of Potato 2024-25

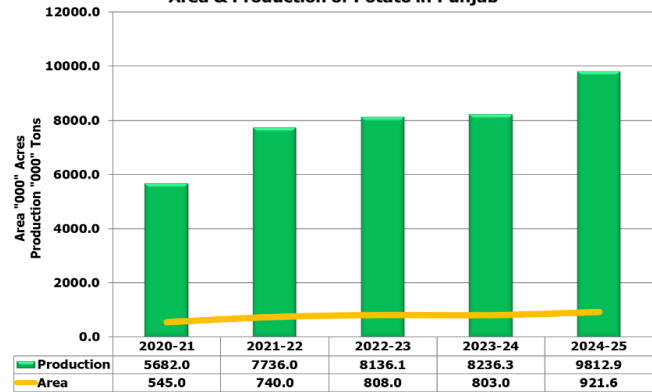


Source: Pakistan Single Window

PROVINCIAL OVERVIEW

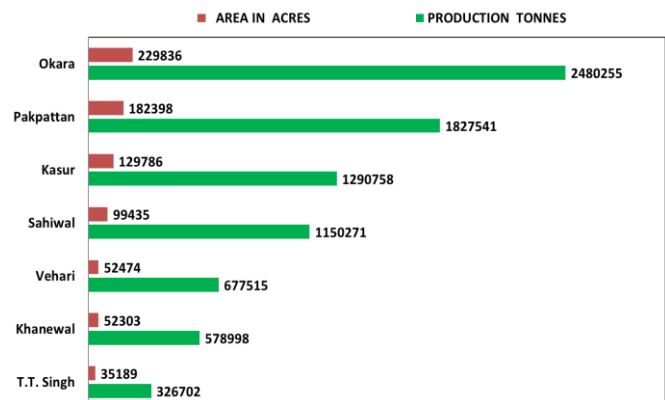
- Punjab holds a dominant position in Pakistan's potato production, producing 98% of the domestic output. The province not only meets its own consumption requirements but also sustains the country's overall demand.
- During last five years potato production in Punjab exhibited steady growth, rising by 72.7% during year 2024-25 in contrast with production achieved in year 2020-21. Likewise, cultivated area also showed increase by 69.1% during the said period.
- In Punjab, Okara district stands as leading producer of potato, with highest production of 2.480 million tons. Other districts Pakpattan, Kasur, Sahiwal, Vehari, Khanewal and Toba Tek Singh also appear as major contributing districts after Okara.

Area & Production of Potato in Punjab



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

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



Source: Crop Reporting Service Punjab



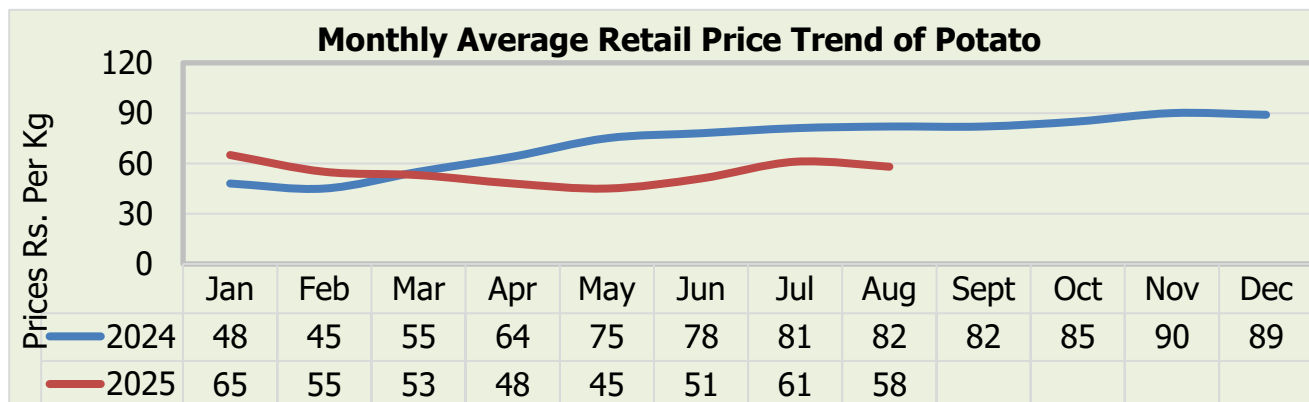
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- Seasonal fluctuations create distinct potato production cycles across all provinces in the country. The major potato-producing districts of each province, along with their respective production seasons, are outlined below:

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

- Given the sufficient availability of potato from local cold storages, supply situation is sustained, however prices are bit on higher side due to addition of storage cost but still lower in contrast with last year. Moreover, fresh potato is arriving in very less quantum from KP, thus price of fresh potato is comparatively higher. Average monthly retail price of potato store during month of August is Rs.58/Kg in local markets.



SUPPLY MANAGEMENT ADVISORY



Assessment

During year 2024-25, potato production in Punjab has reached 9.813 million tons, reflecting a 19.14% rise compared to the previous year's production of 8.236 million tons. This substantial increase has helped to maintain stability in market supply. However, as a result of availability of potato supply from cold storages, prices went on bit higher side but are still on lower side as compared to last year. As regards potato fresh, its supply is very minimal arriving from KP which sets its price comparatively on higher side.



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Forecast

Driven by high production, the overall potato supply in local markets remains steady. Potato supply will remain available from cold storages up to November-2025, till then supply is expected to remain stable with slightly high prices due to addition of storage cost. Local fresh crop of Punjab is likely to arrive in the market during November-2025, however it may be delayed due to recent rainfalls and floods situation in the province. Due to 19.14% higher production, supply & price situation of potato is anticipated to remain stable during current production year.



Advisory



- The District Administration with the help of concerned Secretary Market Committees should assess available stocks in the cold storages and ensure their smooth release as per consumption requirement to keep supply & price situation stable in local markets. Moreover, fresh supply from KP may also be ensured.
- PAMRA Authority through Market Committees should ensure regular assessment of availability of potato stocks in cold storages, which is effective to ensure sustained supply in the local markets.
- Price Control Magistrates should increase inspections to ensure strict enforcement of officially notified rates in open markets.

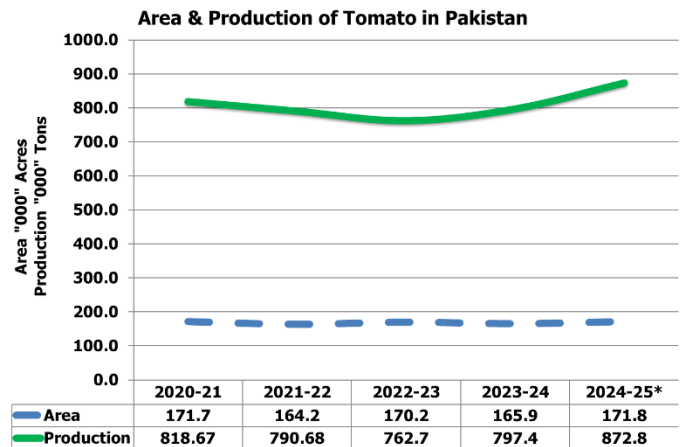


2. TOMATO



NATIONAL OVERVIEW

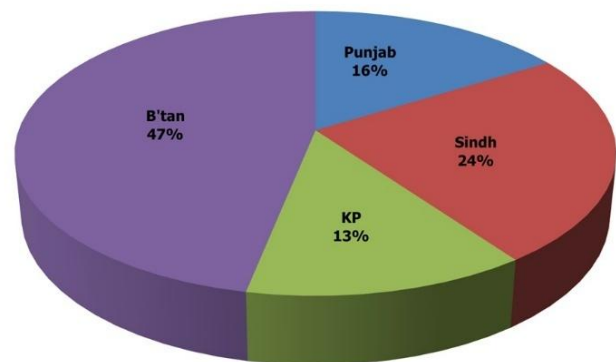
- The production and acreage statistics of tomato in the country have been almost consistent with slight variations during the past three years.
- During year 2024-25, estimated tomato production is recorded at 8,72,825 tons, reflecting a 9.45% increase over the previous year, while the cultivated area increased to 1,71,800 acres, showing 3.5% increase over the last year.



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

- Despite the fact that domestic production of tomato has depicted slight increase, however it remains far lower than domestic consumption requirement. The domestic consumption requirement appears to be 14,77,977 tons, whereas estimated tomato production recorded at only 8,72,825 tons, the resulting deficit of 6,05,152 tons which necessitates reliance on imports to stabilize market supply.
- Balochistan emerges as the leading tomato-producing province, contributing 47% of the national output, followed by Sindh with 24%, Punjab with 16%, and Khyber Pakhtunkhwa with the remaining 13%.

Province Wise Production Share of Tomato 2023-24

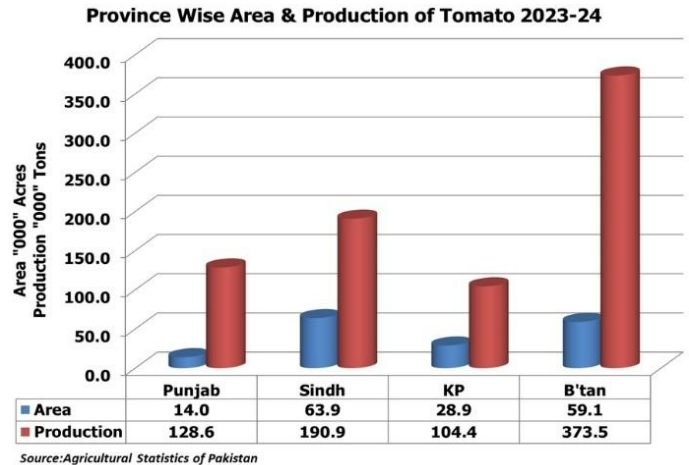




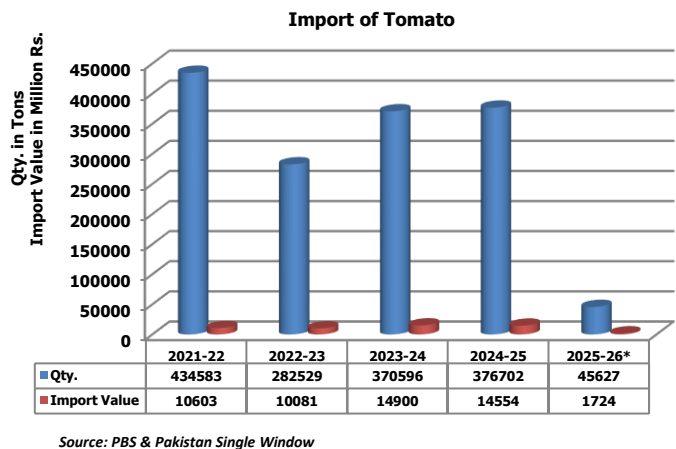
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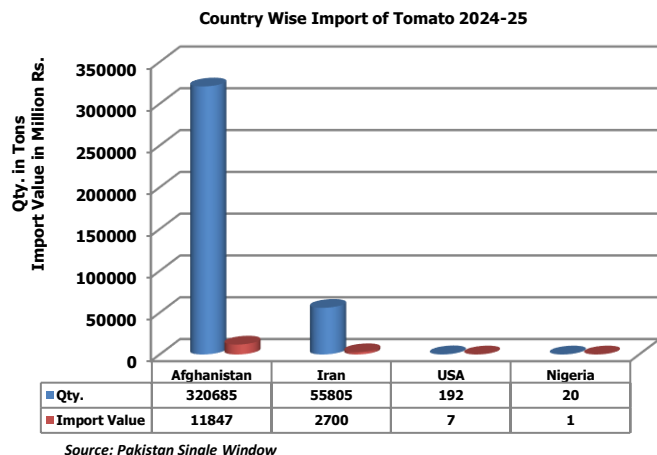
- During year 2023–24, Balochistan ranked first in tomato production, yielding 373,500 tons from 59,100 acres. Sindh stood second with 190,900 tons harvested over 63,900 acres.
- Punjab contributed 128,600 tons from 14,000 acres, while Khyber Pakhtunkhwa recorded the lowest output among provinces, producing 104,400 tons from 28,900 acres.



- Tomato import in Pakistan stood at 3,76,702 tons at a cost of Rs. 14,554 million during year 2024-25, which is comparatively higher quantum as compared to preceding years.
- However, during year 2025-26 (July) tomato import recorded at 45,627 tons in lieu of Rs.1724 million.



- Pakistan's tomato imports are predominantly sourced from Afghanistan and Iran, supplemented by smaller volumes from the USA and Nigeria.
- During year 2024–25, imports from Afghanistan stood at 3,20,655 tons at expense of Rs. 11,846 million, while Iran supplied 55,805 tons having worth of Rs. 2,700 million. Imports from the USA and Nigeria remained negligible.
- Notably, despite relying heavily on imports to bridge domestic demand, Pakistan simultaneously exports tomato, thereby contributing to foreign exchange earnings.

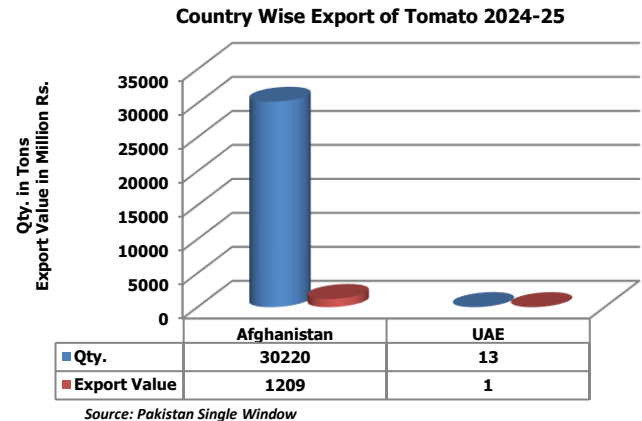
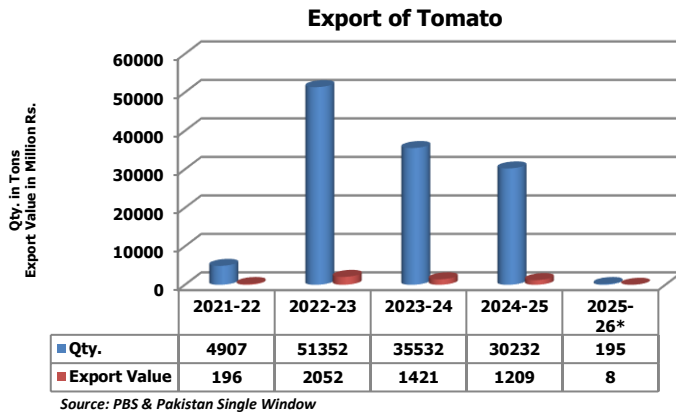




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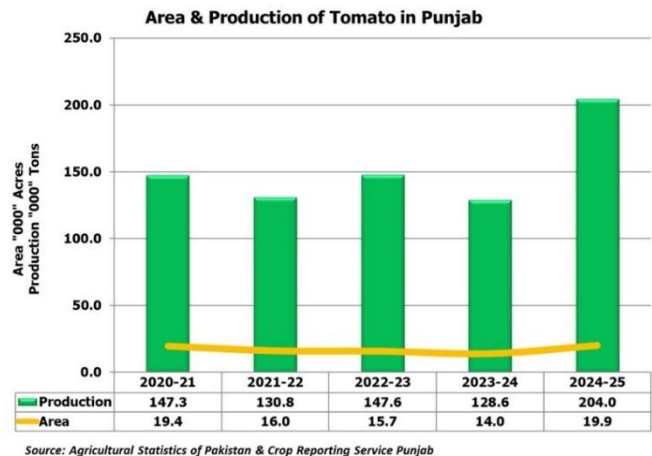


- At the front of export, Pakistan exported 30,232 tons of tomato with export revenue of Rs. 1,209 million, which less in contrast with last year. However, during year 2025–26 (July) export of 195 tons of tomato has been recorded thereby generating export revenue of Rs.8 million. Mostly, tomato exports are routed to Afghanistan, with nominal share to the United Arab Emirates.



PROVINCIAL OVERVIEW

- A deep insight of tomato production in Punjab underscores instability in production as well as acreage of tomato in Punjab province during last 5 years.
- During the year 2024–25, tomato production in Punjab has been recorded at 2,04,000 tons, which is 58.6% higher over the last year. Likewise, area under cultivation has also been increased up to 19,900 acres, which is 42.14% higher in contrast with last year.

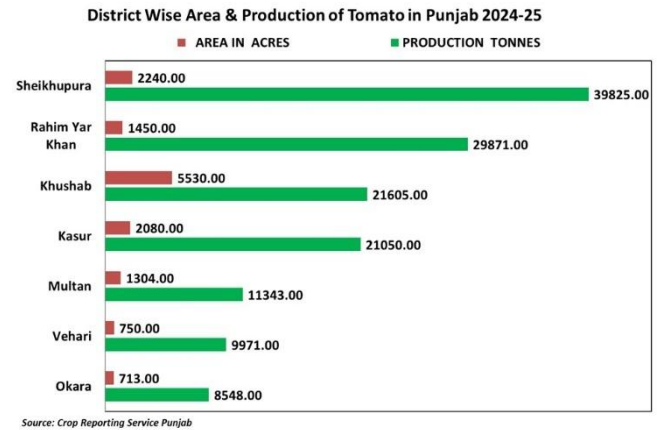




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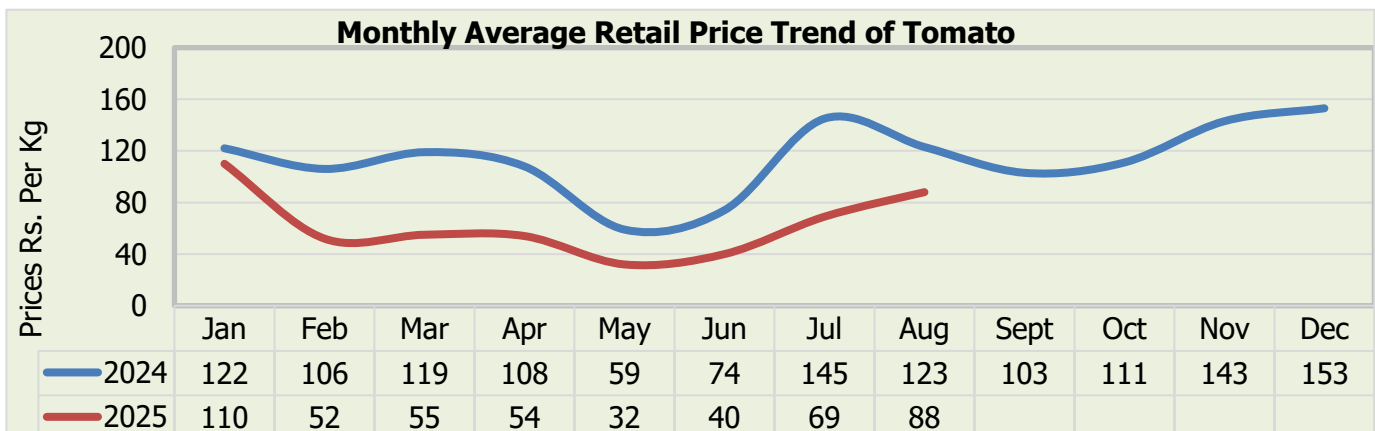
- In Punjab, the leading tomato-producing districts are Sheikhupura, Rahim Yar Khan, Khushab, Kasur, Multan, Vehari and Okara.
- District Sheikhupura ranks first with a production of 39,825 tons, followed by R.Y.Khan at 29,871 tons and Khushab at 21,605 tons.



- Seasonal variations shape the availability of tomato supply from different provinces of the country at various time period round the year. The major tomato-producing districts in each province, along with their respective production seasons are outlined below:

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

- Currently, major supply of tomato is arriving from Balochistan along with import from Afghanistan. Share of domestic supply is gradually declining, which is increasing dependency on import from Afghanistan, resultantly tomato prices are trending on higher side. However current year average monthly prices are far lower as compared to last year. Monthly average retail price of tomato in Punjab is Rs.88 per Kg during August which is 28.46% less than last year price i.e. Rs.123/Kg.





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SUPPLY MANAGEMENT ADVISORY



Assessment

Major supply of tomato is dependent on arrival from Balochistan and import from Afghanistan. Supply from KP has almost wiped out due to recent floods & rainfalls and arrival from Balochistan is also exhibiting declining trend, thus supply is under stress and tomato price in Balochistan is also on higher side at Rs.169/Kg. On account of high tomato prices in Balochistan (Production areas) and increase in dependency on import due to less domestic supply, tomato price is exhibiting increasing trend in local markets.

Forecast

As a result of severe rainfalls and floods domestic supply of tomato is continuously declining, thus import from Afghanistan & Iran is imperative to cater for domestic consumption requirements. Currently supply stress period of tomato is prevailing which is likely to persist till December-2025 and till then tomato prices are likely to remain on higher side. However, Sindh crop of tomato is anticipated to arrive during December, 2025, afterwards supply & price situation of tomato is expected to be normal in local markets. It is apprehended that as country is suffering through heavy rainfalls and floods situation, it may cause delay in sowing of tomato in Sindh, in this scenario tomato supply will remain under stress with its prices on higher side.



Advisory



- As tomato supply is heavily reliant on import from Afghanistan & Iran. Thus, DG PAMRA should approach Ministry of National Food Security & Research and Ministry of Commerce Islamabad to ensure smooth & steady import without any disruption.
- The District Administration and PAMRA Authority with the help of Secretaries Market Committees, should establish strong coordination with commission agents to arrange a consistent supply of tomato from Balochistan along with continuous import from Afghanistan & Iran to cater for consumption requirements.
- The District Administration with the help of Price Control Magistrates should control over charging by retailers through regular inspections.
- PAMRA Authority should ensure fair and transparent price fixation mechanism through strict monitoring of auction proceedings in Agricultural Produce Markets.

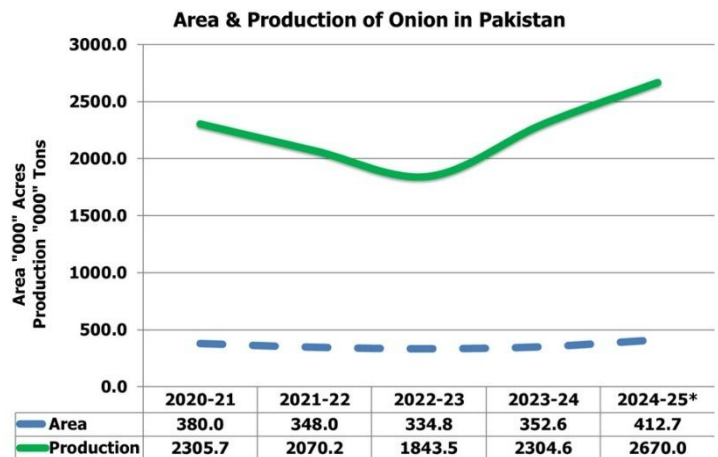


3. ONION



NATIONAL OVERVIEW

- As regards onion, domestic production and the area under cultivation in Pakistan have been increasing since last three years.
- During the fiscal year 2024–25, estimated domestic onion production reached 2.670 million tons—reflecting a 15.8% increase over the previous year.
- During the same period, the cultivated area expanded to 412,700 acres, marking a 17.04% year-on-year increase.

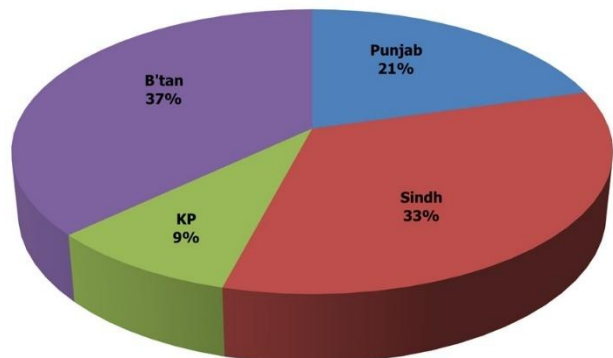


*=Provisional

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

- Balochistan remains the largest contributor to Pakistan's onion production, providing 37% of the national output, followed by Sindh with 33%.
- Punjab ranks third with a 21% share, while Khyber Pakhtunkhwa (KP) accounts for the smallest contribution, producing just 9% of the country's overall onion yield

Province Wise Production Share of Onion 2023-24

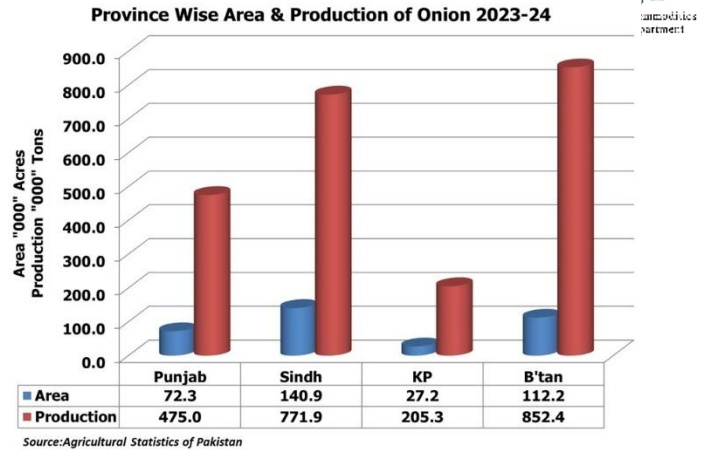




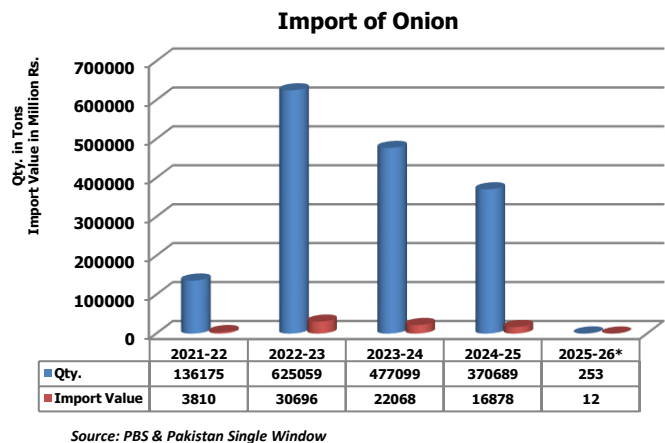
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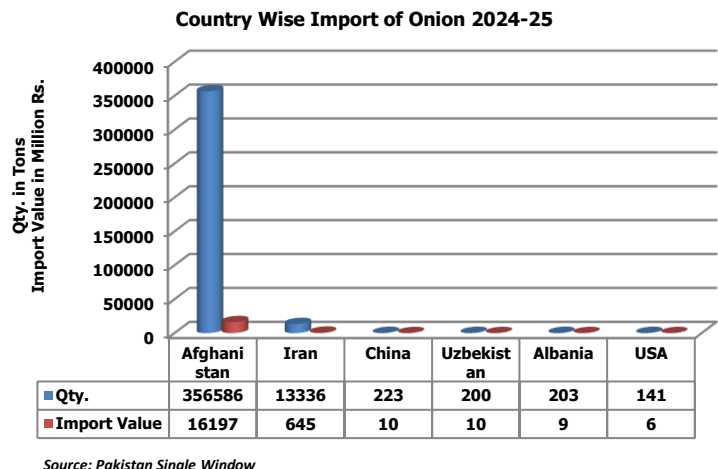
- During year 2023–24, Balochistan led onion production with 852,400 tons harvested from 112,200 acres. Sindh stood at 2nd rank, by producing 771,900 tons across 140,900 acres.
- Whereas, Punjab contributed 474,600 tons from 72,300 acres and Khyber Pakhtunkhwa (KP) recorded the lowest share, with 205,300 tons cultivated over 27,200 acres.



- Due to inadequate domestic production, Pakistan relies on onion imports to meet national consumption requirements. The estimated domestic production of onion stood at 26,70,000 tons in contrast with domestic consumption requirements i.e. 27,53,094 tons, thereby generating supply deficit of 83,094 tons.
- In the fiscal year 2024–25, onion imports recorded at 3,70,699 tons at a cost of Rs. 16,878 million, which is comparatively less in contrast with last year in terms of quantum and value.
- However, during year 2025-26 (July), imports stood at 253 tons, with an expenditure of Rs. 12 million.



- Pakistan primarily imports onions from Afghanistan, Iran, China, Uzbekistan, Albania and the United States.
- Among these, Afghanistan and Iran account for the majority share, while imports from other countries remain comparatively limited. During the year 2024–25, Pakistan imported 356,586 tons of onions from Afghanistan at a cost of Rs. 16,197 million.
- An additional 13,336 tons were sourced from Iran, amounting to Rs. 645 million in expenditure.

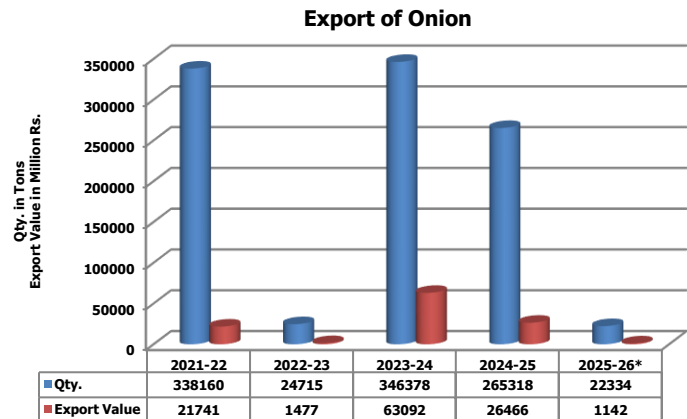




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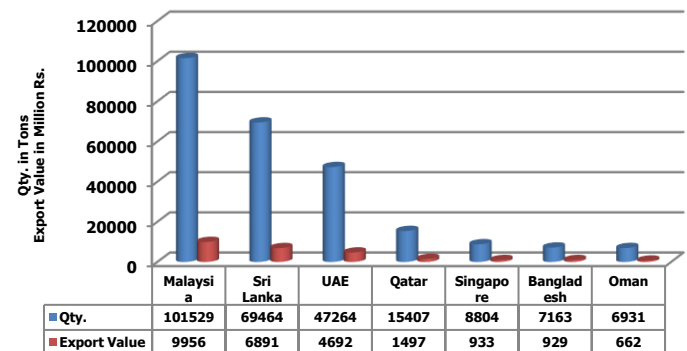
- To strengthen its foreign exchange reserves, Pakistan also exports onions to a range of international markets.
- In the fiscal year 2024–25, onion exports totaled 2,65,318 tons, generating Rs. 26,466 million in revenue, which appeared to be less than last year.
- During year 2025-26 (July), export volumes stood at 22,334 tons, with earnings of Rs. 1142 million.



Source: PBS & Pakistan Single Window

- Key export destinations include Malaysia, Sri Lanka, the United Arab Emirates (UAE), Qatar, Bangladesh, Singapore, and Oman.
- Export volumes to Malaysia, Sri Lanka, and the UAE are particularly substantial, underscoring strong demand for Pakistani onions in these high-priority markets.
- During the year 2024-25, Pakistan exported 1,01,529 tons of onion to Malaysia, generating revenue of Rs. 9,956 million.
- Similarly, 69,464 tons have been exported to Sri Lanka, while 47,264 tons have been dispatched to the UAE.

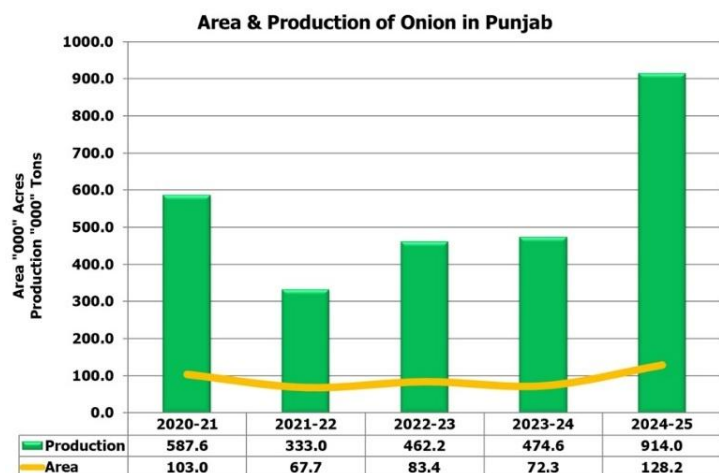
Country Wise Export of Onion 2024-25



Source: Pakistan Single Window

PROVINCIAL OVERVIEW

- In Punjab, production of onion is showing increasing trend over last three years.
- During year 2024–25, onion production in Punjab has been noted at 9,14,000 tons, reflecting a 92.5% surge over the last year and 55.5% increase in contrast to year 2020-21.
- The cultivated area of onion has been recorded at 1,28,200 acres, showing a 77.3% increase over the last year and 24.46% increase relative to year 2020–21.



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

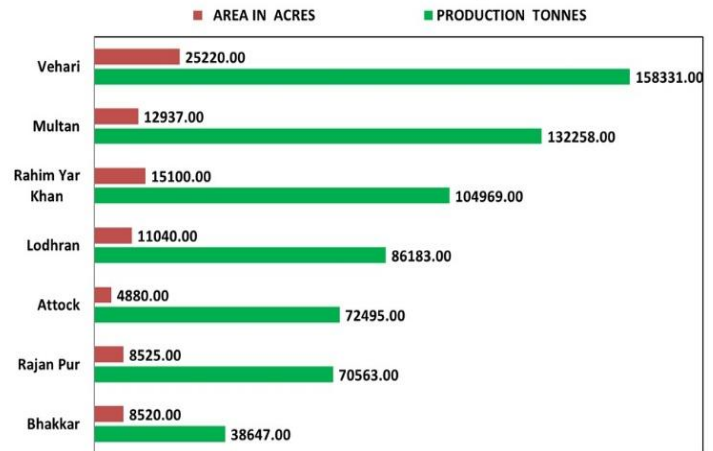


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- List of major producing districts of onion in Punjab includes Vehari, Multan, Rahim Yar Khan, Lodhran, Attock, Rajanpur, and Bhakkar.
- Vehari secured 1st rank producing 1,58,331 tons from 25,220 acres, followed by Multan with 1,32,258 tons harvested from 12,937 acres. R.Y.Khan stood at 3rd rank having production of 1,04,969 tons.

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

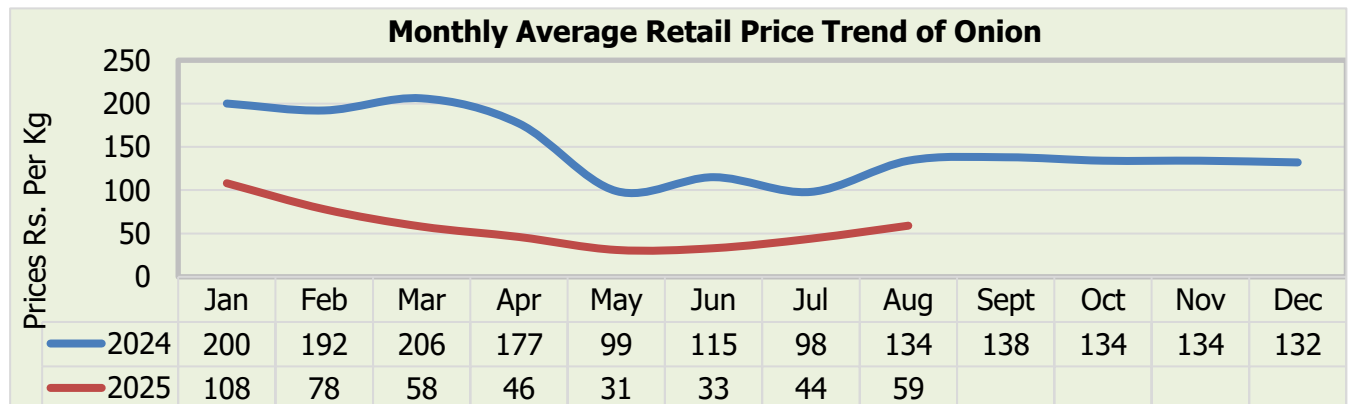


Source: Crop Reporting Service Punjab

- The supply of onion across Pakistan experiences seasonal fluctuations, with production shifting among provinces at different times of the year. The major onion-producing districts in each province, along with their respective production seasons, are outlined below:

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

- Currently, Punjab is experiencing off production season of onion. Supply of onion is totally dependent on arrival from Balochistan and KP. Onion supply is stable, however price is showing slightly increasing trend due to dependence on arrival from other provinces. The graphical trend of monthly average retail price of onion in Punjab is given as under:





Price Control & Commodities Management Department



SUPPLY MANAGEMENT ADVISORY



Assessment

Local supply is not available due to off production season. Major influx of onion is being sourced from Balochistan and KP. Due to sufficient arrival of onion from Balochistan, its supply is almost stable. However, prices are bit on higher side due to increase in dependence on other provinces for supply of onion in local markets.

Forecast

Onion supplies from KP are expected to sustain till September-2025, whereas from Balochistan will last till November-2025. After September-2025 supply stress is likely to prevail due to lapse of production season in KP and then import from Afghanistan will be imperative to maintain stable supply in the local markets. Till November-2025, onion supply will be reliant on arrival from Balochistan as well as import from Afghanistan. As Balochistan is biggest producer of onion in the country, thus supply is likely to remain stable, however prices may fluctuate on higher side due to addition of import cost. Onion crop of Sindh is likely to start during November-2025, however recent rainfalls and floods situation may cause delay in onion sowing in Sindh, which may cause stress in onion supply due to late arrival of onion crop from Sindh.



Advisory



- PAMRA Authority with the help of concerned Secretaries Market Committees, should engage commission agents to ensure sustained supplies of onion from Balochistan & Khyber Pakhtunkhwa along with necessary arrangements for smooth import from Afghanistan.
- PAMRA Authority should ensure transparent and fair price fixation mechanism by ensuring strict monitoring of auction proceedings in Agricultural Produce Markets on daily basis.
- The District Administration with the help of Price Control Magistrates should control over charging by the retailers through their regular inspections.

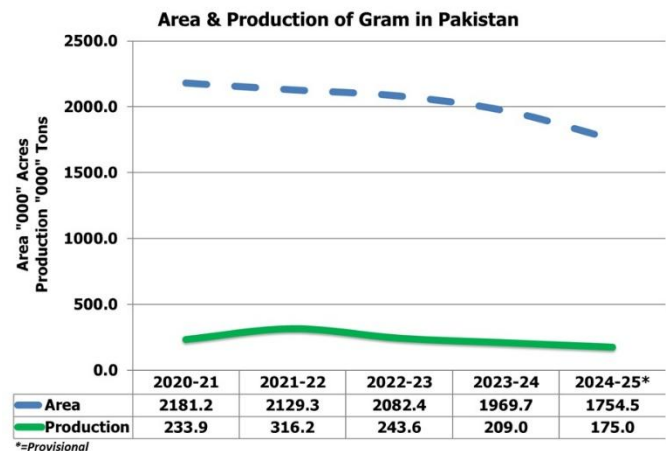


4. GRAM (Chickpea)

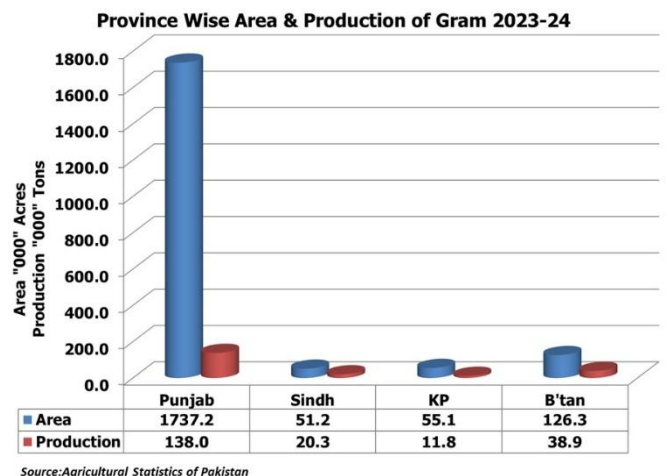


NATIONAL OVERVIEW

- According to Agricultural Statistics of Pakistan and Economic Survey of Pakistan, domestic production of gram is exhibiting gradually decreasing trend over last three years.
- During year 2024–25, estimated domestic production of gram has appeared to be 1,75,000 tons—reflecting a 16% decline compared to the previous year, whereas 25.18% less in contrast with year 2020–21. This production decline has resulted in sharp supply gap, which makes import imperative to cater for consumption requirements.



- Punjab is predominant province with respect to production of gram. During year 2023-24, gram production in Punjab stood at 1,38,000 tons through an area of 17,37,200 acres. Whereas in Balochistan, Sindh and KP production recorded at 38,900 tons, 20,300 tons and 11,800 tons, respectively.



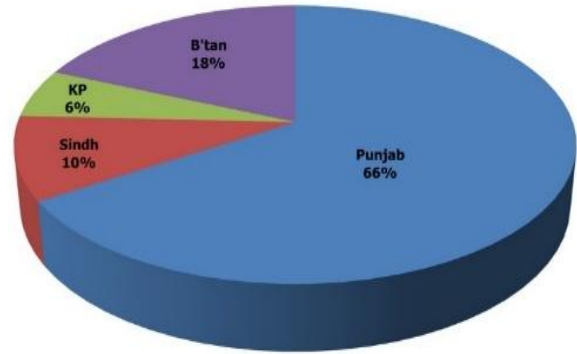


Price Control & Commodities Management Department



- Punjab holds the pivotal role in gram production, contributing 66% of the national production. It is followed by Balochistan with 18%, Sindh with 10%, and Khyber Pakhtunkhwa (KP) with 6%.

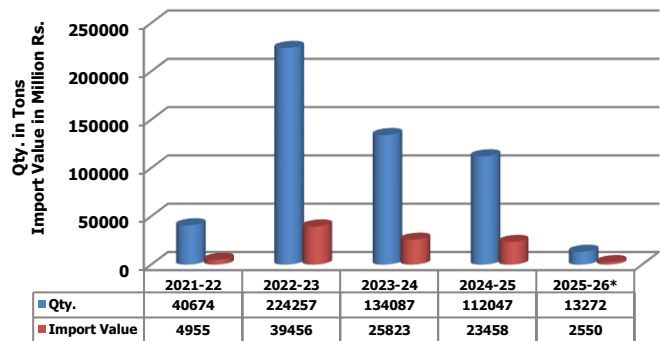
Province Wise Production Share of Gram 2023-24



- As a result of less domestic production, Pakistan remains in need of gram imports from other countries to satisfy domestic demand. Estimated domestic production of gram during year 2024-25 appeared to be 1,75,000 tons compared with consumption requirements of 3,76,739 tons, underscore supply shortfall of 2,01,739 tons.

- During year 2024-25, gram import in Pakistan recorded at 1,12,047 tons of gram at a total cost of Rs. 23,458 million. During year 2025-26 (July), imports recorded at 13,272 tons, amounting to Rs. 2550 million.

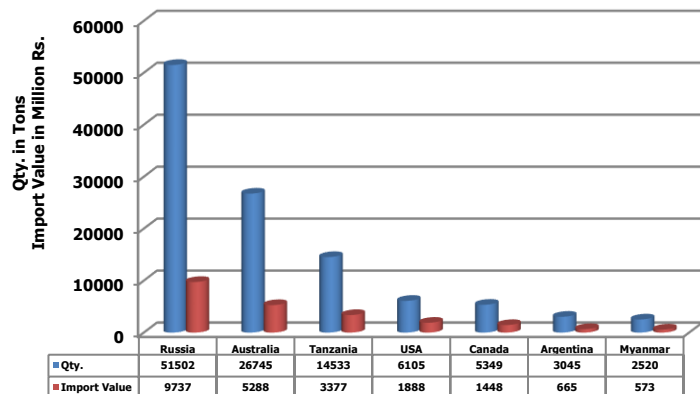
Import of Gram



Source: PBS & Pakistan Single Window

- Pakistan mostly arranges imports of gram from Russia, Australia, Tanzania, the United States, Canada, Argentina and Myanmar. Quantum of import from Russia, Tanzania, and Australia is higher, whereas imports from the remaining countries contribute relatively smaller shares in terms of both volume and value.

Country Wise Import of Gram 2024-25



Source: Pakistan Single Window



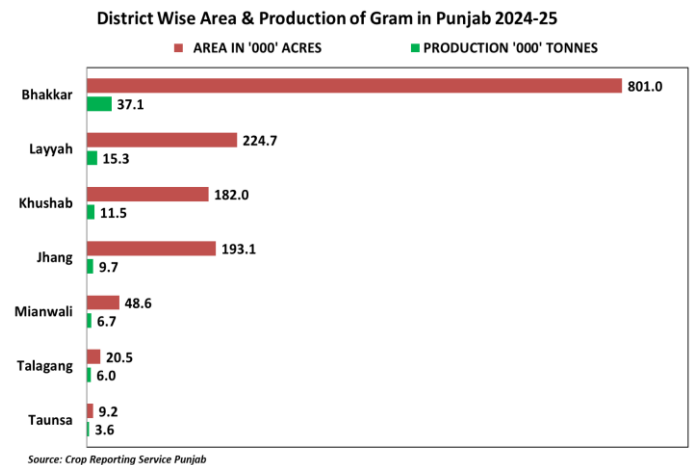
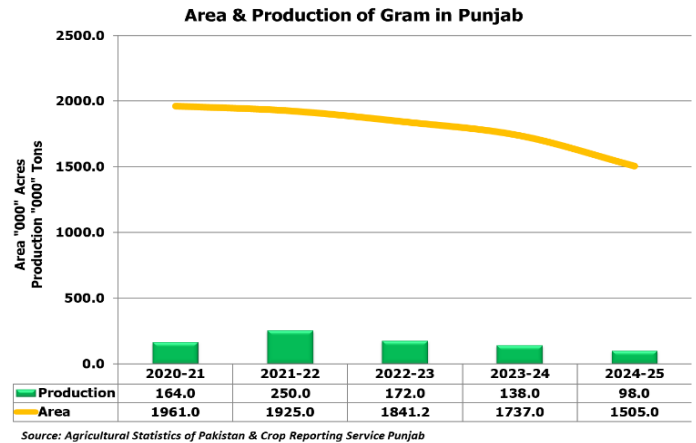
Price Control & Commodities Management Department

PROVINCIAL OVERVIEW

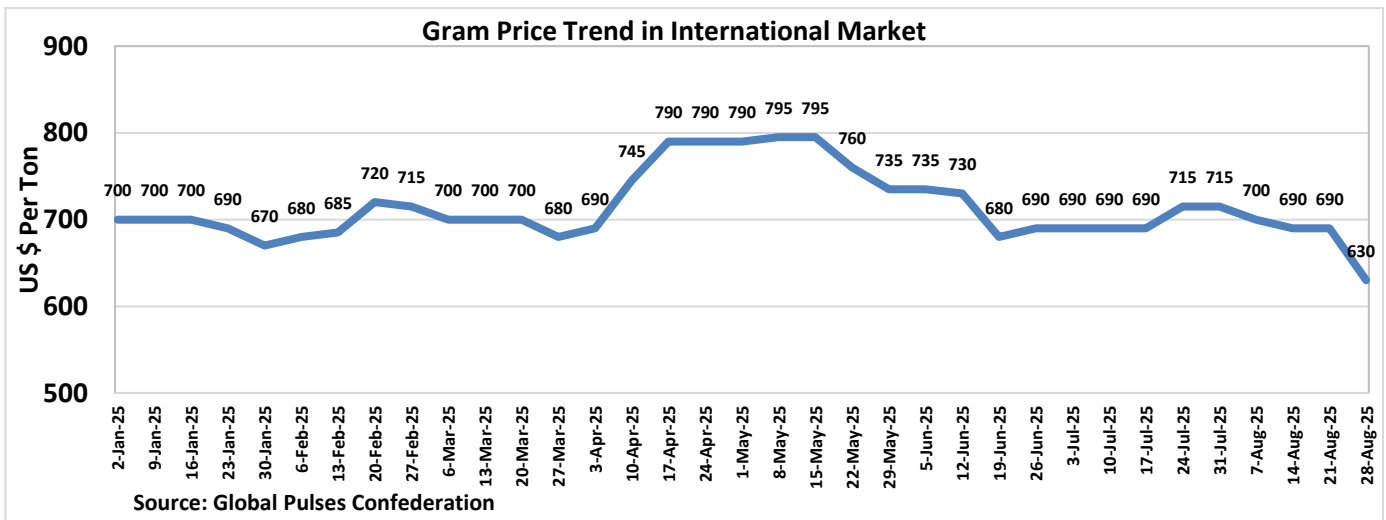


Production of gram in Punjab is not appreciable, as statistics of both cultivated area and production are consistently declining over the time period. During year 2024-25 gram production in Punjab stood at 98,000 tons which has experienced a sharp 28.98% decline in contrast with last year. This substantial drop raises concerns over the long-term stability of gram supply in local markets.

- In Punjab, key producing districts of gram are Bhakkar, Layyah, Khushab, Jhang, Mianwali, Talagang & Taunsa. Bhakkar stands out as the leading producer with the largest cultivated area of 8,01,000 acres and the highest production volume at 37,100 tons.



- Canada gram crop has started to arrive in international markets which resulted in decline in international prices of gram from USD 690/ton to USD 630/ton. Moreover, gram harvesting season in Australia is also likely to begin during October-November, which will further ease out international market of gram. The weekly price trends reported by the Global Pulse Confederation, is outlined below:

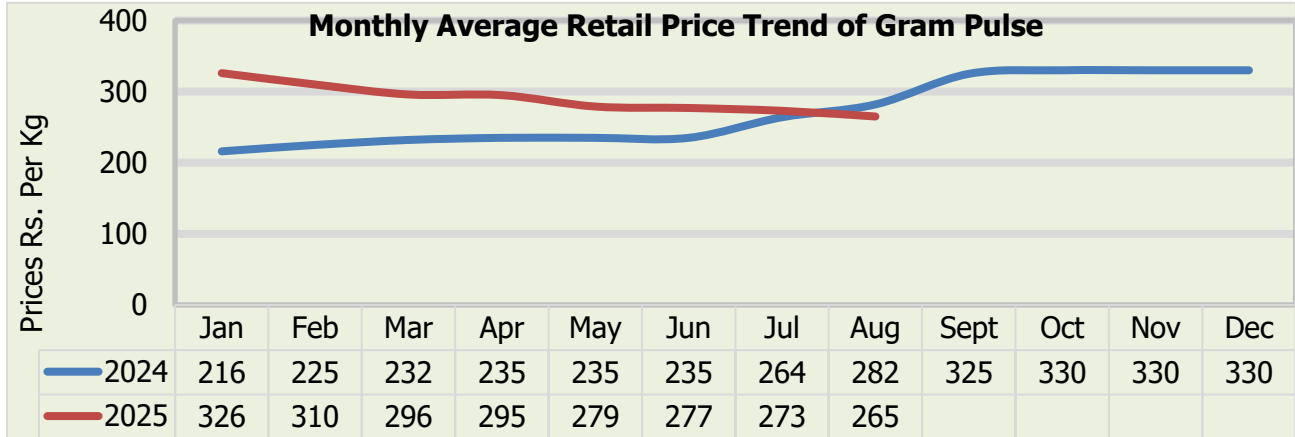




Price Control & Commodities Management Department



- As a result of drop in international prices, local prices of gram have also started to decrease. Monthly average retail price of gram in Punjab has been recorded at Rs. 265 per kilogram during August.



SUPPLY MANAGEMENT ADVISORY

Assessment



Currently, off production season of gram is prevailing in Punjab. Thus, supply of gram is majorly reliant on import from other countries. Harvesting season of gram in Canada is in progress which has set international prices of gram to decrease. International prices of gram have decreased from USD 690/ton to USD 630/ton during last two weeks. Subsequently, prices of gram have also declined from Rs.273/Kg to Rs.265/Kg in local markets.

Forecast

Due to availability of Canada crop of gram, its supply in international market has improved and international prices are exhibiting declining trend. Resultantly, declining trend in local prices is also being observed. Moreover, Australia crop of gram is also expected to arrive during October-November, which will provide further cushion to international market. Therefore, import is likely to remain smooth and resultantly local prices are expected to decrease further.





Price Control & Commodities Management Department



Advisory



- Availability of gram crop from Canada & expected new crop from Australia has resulted in drop in international prices from USD 690/ton to USD 630/ton during last two weeks. All Deputy Commissioners across Punjab must consider this decline in international prices of Gram in DPCC meeting while fixing prices of gram in their respective district.
- District Administration with the help of Price Control Magistrates should ensure regular inspections of retailers for strict implementation of retail notified retail rates. Moreover, stock situation also be monitored regularly.
- In view of persistent decline in gram cultivation and production, the Agriculture Department should prioritize expanding the area under pulses particularly gram and promote the adoption of climate-resilient and drought-tolerant varieties to ensure sustainable output and reduce import dependency.

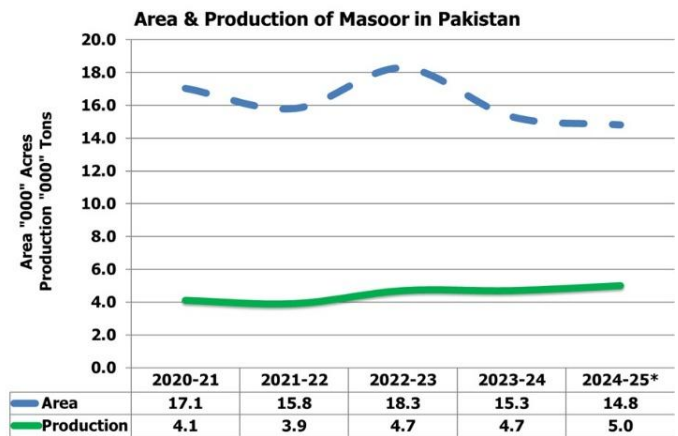


5. LENTIL (MASOOR)



NATIONAL OVERVIEW

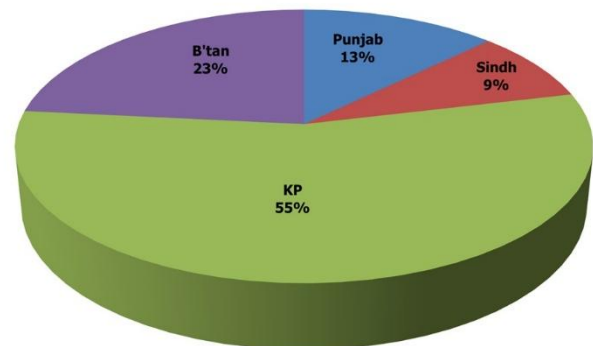
- Due to insufficient domestic production, Pakistan remains highly dependent on masoor (lentil) imports to satisfy national consumption requirements.
- The cultivation of masoor has exhibited a modest upward trend over the past five years. In year 2024–25, domestic production is estimated at 5 million tons, reflecting a 6.8% increase from the previous year and a 21.9% rise compared to year 2020–21. However, the cultivated area has declined to 14,800 acres, representing a 3.22% reduction year-on-year and a steep 86.95% contraction relative to year 2020–21.
- Estimated domestic production of masoor during year 2024-25 has been noted at 5000 tons, whereas consumption requirements stood at 1,73,880 yielding supply deficit of 1,68,880 tons.



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

- A provincial comparison underscores that Khyber Pakhtunkhwa (KP) appeared to be leading producer with 55% of the total domestic output, which is followed by Balochistan (23%), Punjab (13%), and Sindh (9%).

Province Wise Production Share of Masoor 2023-24

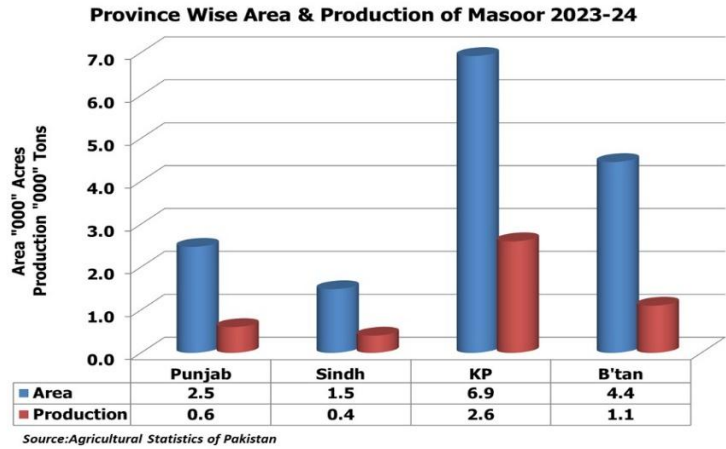




Price Control & Commodities Management Department

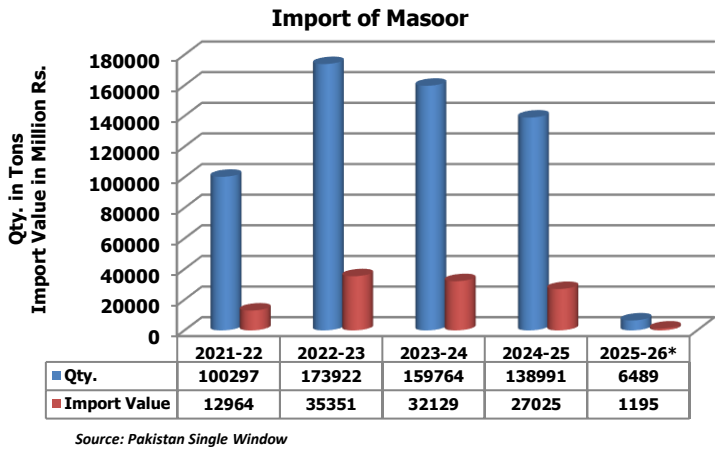


- During year 2023–24, Khyber Pakhtunkhwa (KP) achieved an output of 2,600 tons from 6,900 acres. Balochistan followed with 1,100 tons, while Punjab and Sindh contributed 600 tons and 400 tons, respectively.

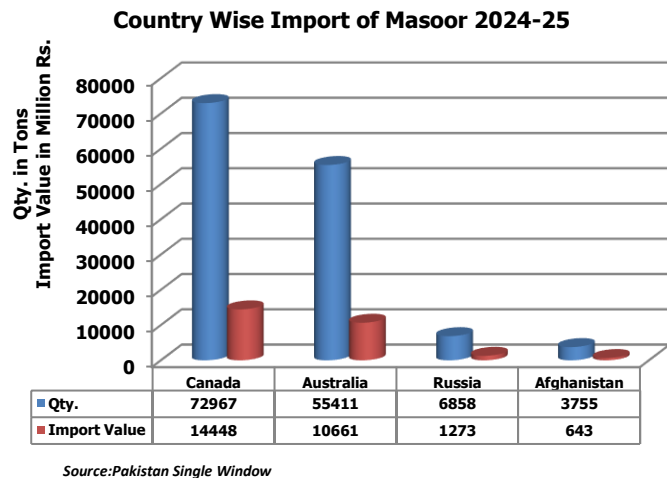


Given the negligible scale of domestic production, Pakistan remains heavily reliant on masoor (lentil) imports to meet national consumption requirements.

- During year 2024-25, the country imported 1,38,991 tons of masoor, incurring a cost of Rs. 27,025 million, which is comparatively less than last year.
- However, during year 2025–26 (July), imports stood at 6489 tons, valued at Rs. 1,195 million.



- Pakistan primarily sources masoor from Canada, Australia, Russia and Afghanistan, with Canada and Australia accounting for the bulk of the import volume. In contrast, supplies from Russia and Afghanistan remain relatively limited.
- During year 2024–25, Pakistan imported 72,967 tons from Canada, costing Rs. 14,448 million, while 55,411 tons sourced from Australia at an expense of Rs. 10,661 million.



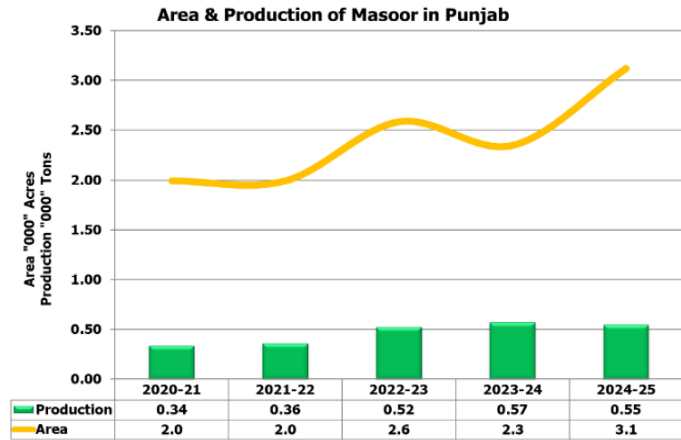


Price Control & Commodities Management Department



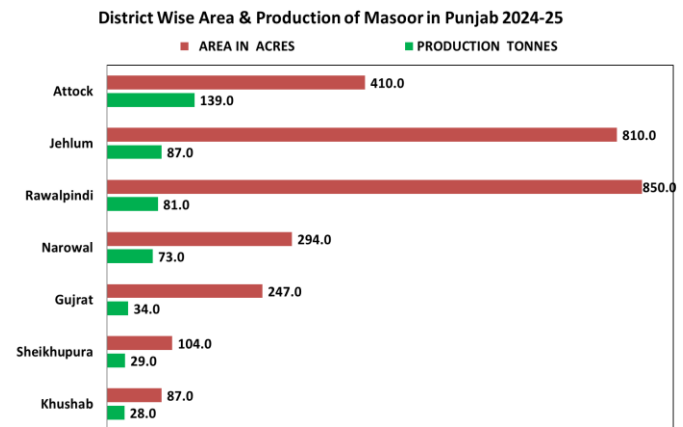
PROVINCIAL OVERVIEW

- Punjab's share in domestic production of masoor is negligible as a result of its less production.
- The cultivated area and production of masoor in Punjab are showing slightly increasing trend over last 5 years. During year 2024–25, the cultivated area stood at just 3100 acres—reflecting a 34.7% higher from the previous year and a sharp 55% higher compared to 2020–21. Production reached to 546 tons, showing a modest decrease of 3.5% over previous year, yet a significant 61.76% increase relative to year 2020–21.



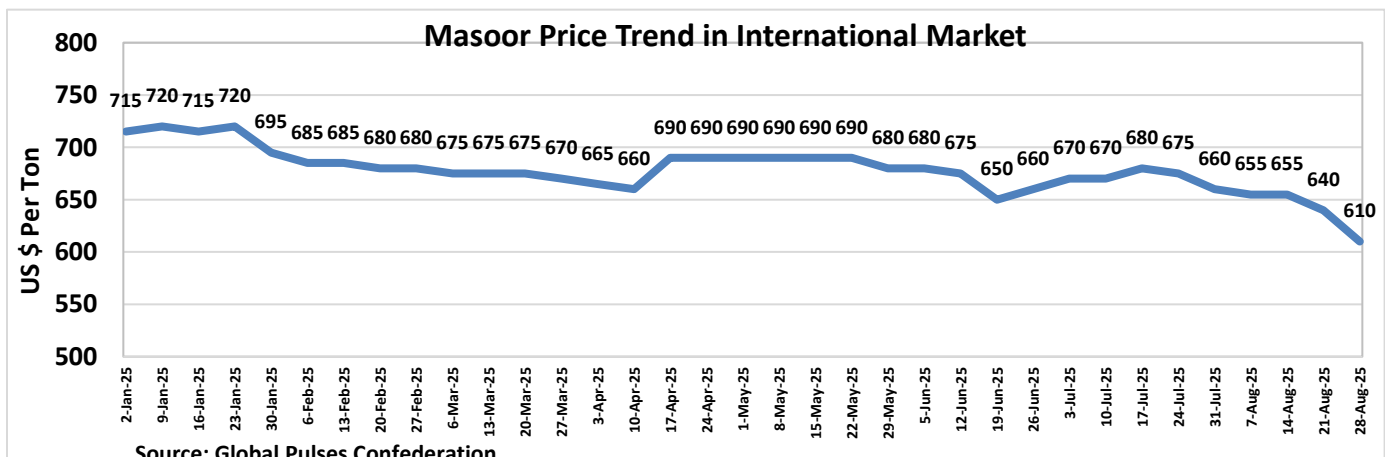
Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

- The key producing districts of masoor in Punjab include Attock, Jhelum, Rawalpindi, Narowal, Gujrat, Sheikhupura & Khushab. Attock stands as leading district with highest production of 139 tons harvested from 410 acres of cultivated land.



Source: Crop Reporting Service Punjab

- As per availability of masoor crop from Canada, its international prices of Masoor have decreased from USD 640/ton to USD 610/ton during the last two weeks. The weekly trend in international masoor prices, as reported by the Global Pulse Confederation, is illustrated below:



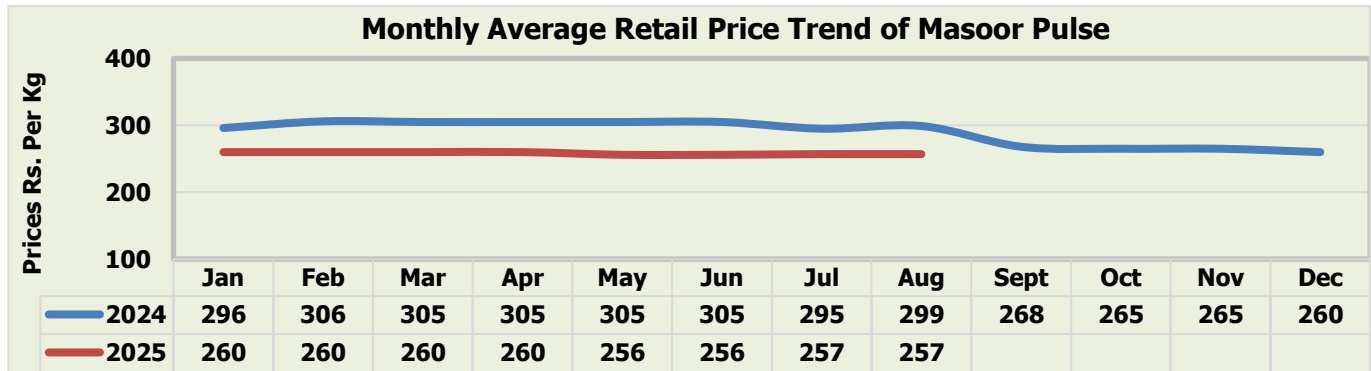
Source: Global Pulses Confederation



Price Control & Commodities Management Department



- The drop in international prices of masoor, resulted in smooth import and slight decrease in local price of Masoor. Monthly average retail price of masoor in Punjab is Rs. 257/kg during August, showing stable trend over the last month.



SUPPLY MANAGEMENT ADVISORY

Assessment



Due to negligible domestic production, Pakistan remains heavily reliant on imports to meet domestic demand. Due to availability of fresh masoor crop from Canada, international prices are exhibiting a downward trend, leading to smooth import in the country without any disruption. Resultantly, supply & price situation of masoor is depicting stable trend in local markets.

Forecast

On account of availability of Canada crop of masoor, international prices are exhibiting declining trend. Thus, import is expected to remain stable and leading to stability in local prices of masoor. Australia crop is also expected to start arriving during October-November, which will further improve supply situation of masoor in international market. Thus, local supply & price situation of masoor is anticipated to be stable in coming days.



Advisory



- All Deputy Commissioners across Punjab must consider decrease in international rates of Masoor during meeting of DPCC to pass on relief to common man.
- District Administration with the help of Price Control Magistrates should ensure regular inspections of retailers for strict implementation of retail notified retail rates. Moreover, stocks may also be tracked frequently.
- Moreover, the Agriculture Department must take prompt measures to expand the area under masoor cultivation and promote the use of climate-resilient and drought-tolerant varieties to enhance local production.

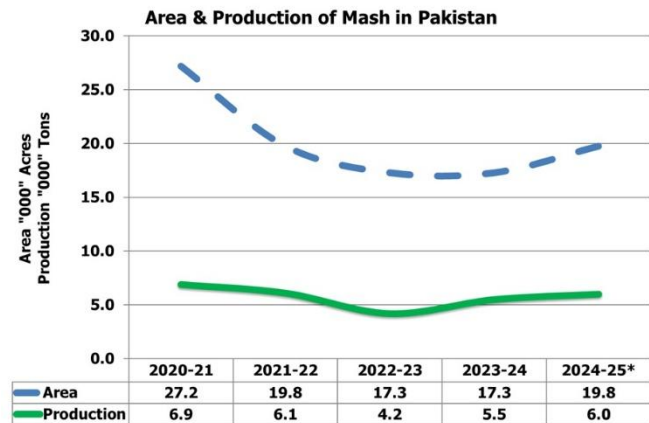


6. MASH



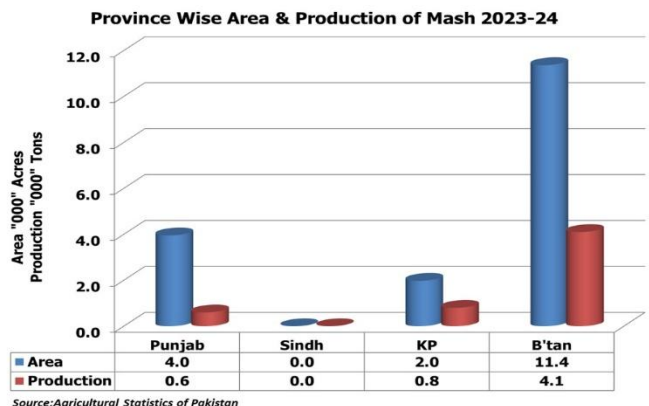
NATIONAL OVERVIEW

- Domestic mash production remains negligible, with nearly 92% of national consumption demand met through imports.
- In fiscal year 2024–25, domestic output of mash is estimated at only 6,000 tons, against a national requirement of 144,900 tons—leaving a massive supply deficit of 138,900 tons.

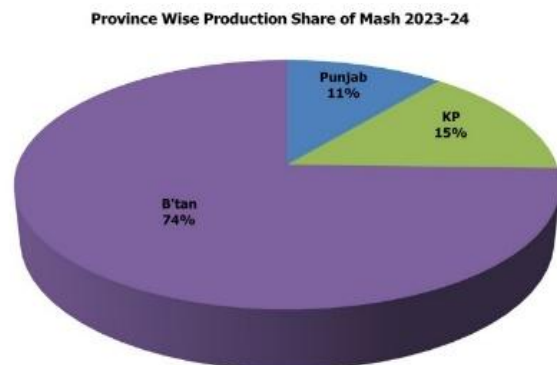


*=Provisional
Source: Agricultural Statistics of Pakistan & Economics Survey of Pakistan 2024-25

- The area under cultivation and domestic production of mash have both followed a gradual downward trend in recent years. In 2023–24, Pakistan recorded a production of 5,590 tons, harvested from 17,300 acres. While this reflects a slight increase in production compared to the previous year, the cultivated area remained stagnant.



- Provincial contributions highlight Balochistan as the leading producer, accounting for 74% of total output (4,100 tons). Khyber Pakhtunkhwa followed with 14% (800 tons), while Punjab contributed 12% (600 tons) and Sindh's contribution remained nil.

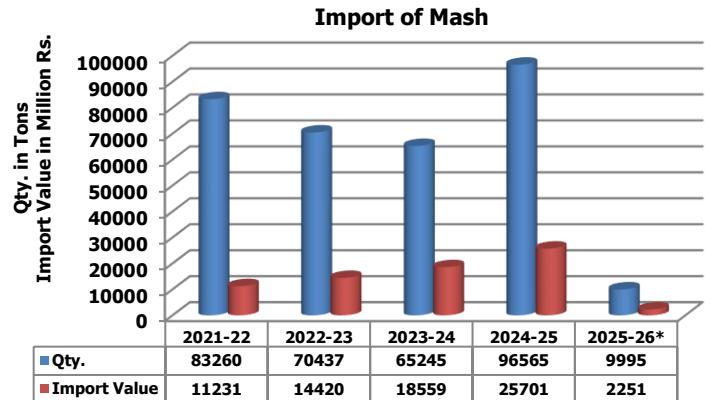




Price Control & Commodities Management Department

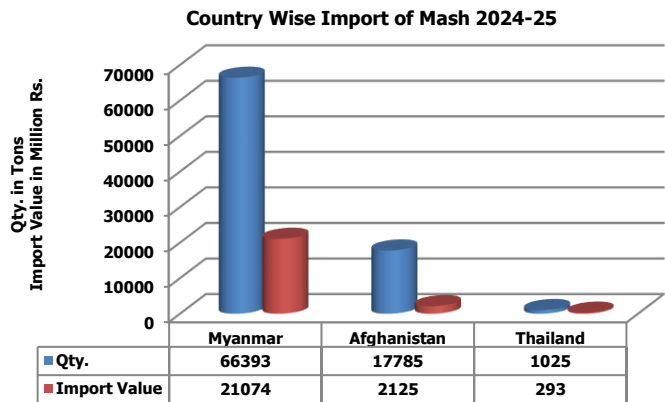


- Given the limited domestic output, Pakistan remains heavily dependent on imports to fulfill its national mash consumption requirements. In year 2024–25, imports stood at 96,565 tons, valued at Rs. 25701 million. During year 2025-26 (July), imports recorded at 9995 tons, costing Rs. 2251 million.



Source: Pakistan Single Window

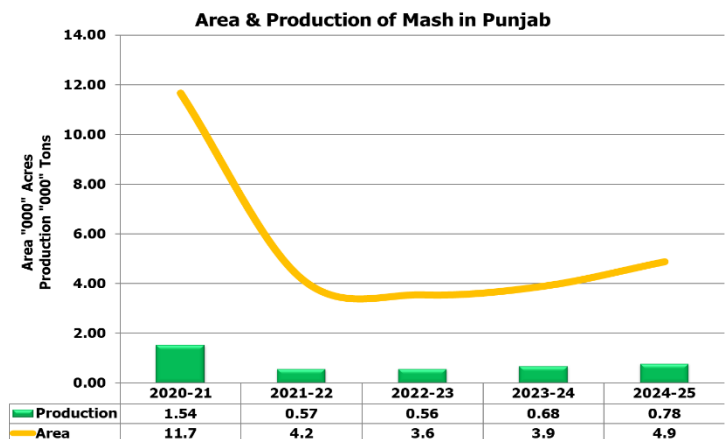
- The bulk of these imports originated from Myanmar, Afghanistan, and Thailand, with Myanmar and Afghanistan serving as the primary sources. During 2024-25 (July to May), Pakistan imported 66,393 tons of mash from Myanmar and 17,785 tons from Afghanistan, while imports from Thailand recorded at 1025 tons.



Source: Pakistan Single Window

PROVINCIAL OVERVIEW

- In the fiscal year 2024–25, both the cultivated area and production of mash registered a modest recovery compared to the preceding year.
- The cultivated area expanded to 4,900 acres, reflecting a 25.6% year-on-year increase. However, this figure still represents a steep 58.1% decline relative to the level recorded in year 2020–21.
- Similarly, mash production rose to 780 tons in 2024–25, posting a 14.7% increase over the previous year. Yet, this output remains 49.3% lower than that of year 2020–21, underscoring a persistent long-term decline in domestic production.



Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

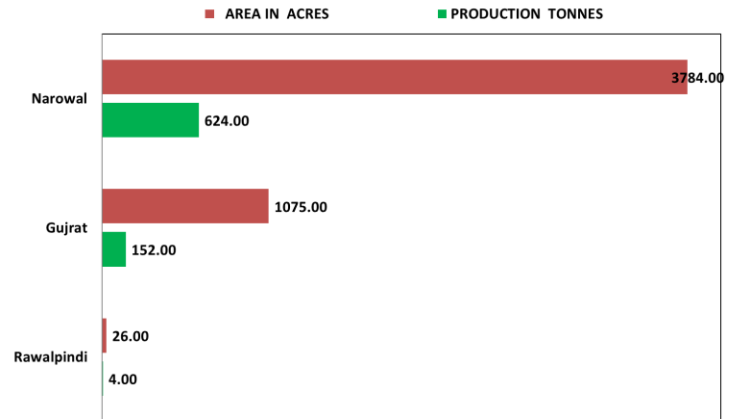


Price Control & Commodities Management Department



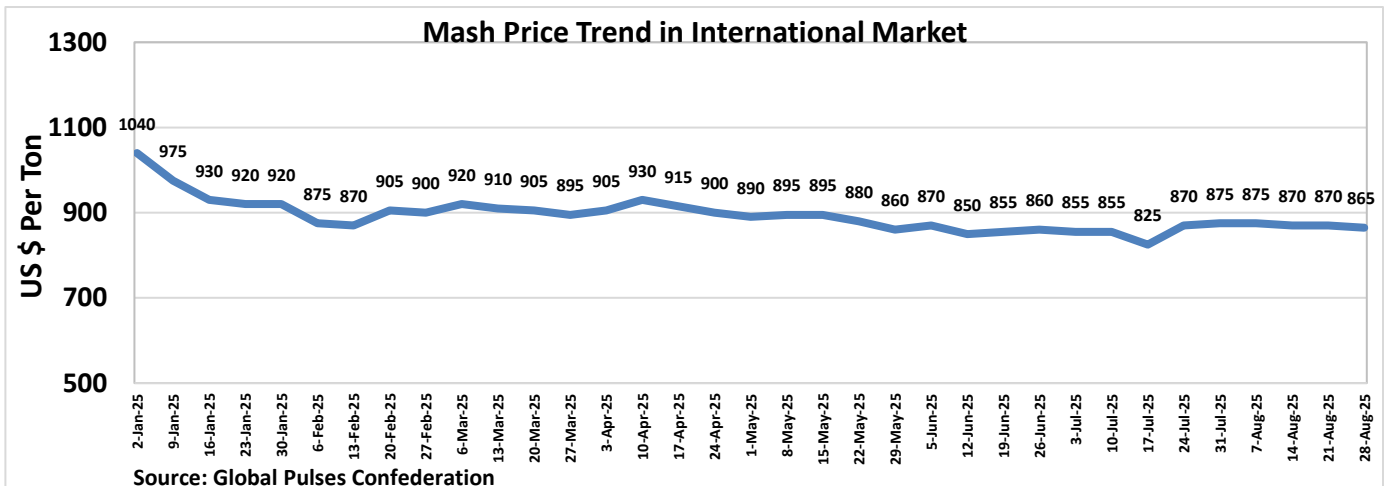
- In Punjab, the primary mash-producing districts include Narowal, Gujrat, and Rawalpindi. Among them, Narowal emerged as the top producer, contributing 624 tons, harvested from a cultivated area of 3784 acres.

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



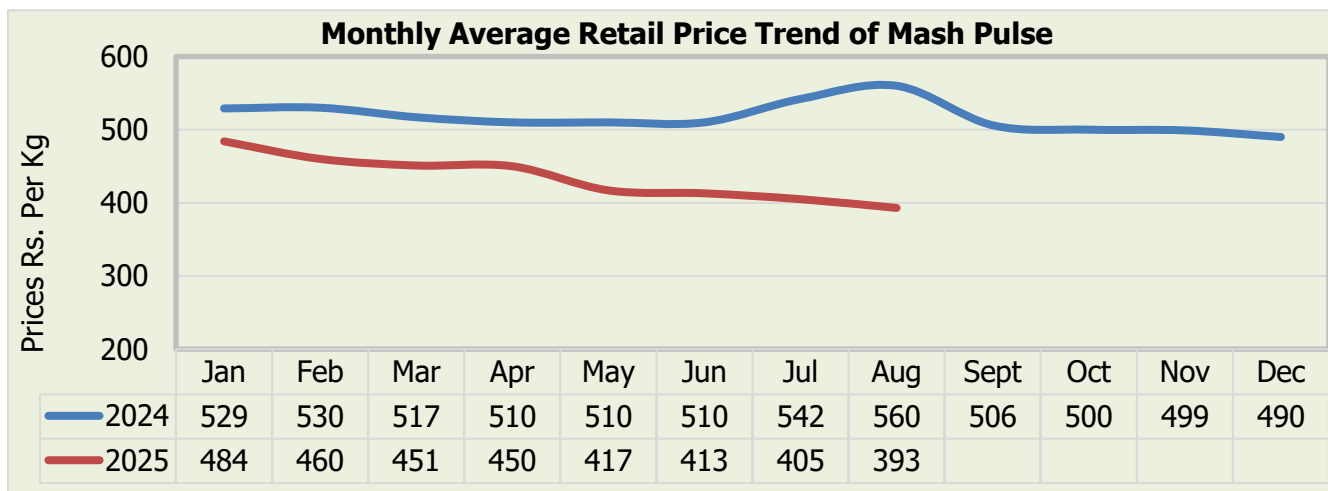
Source: Crop Reporting Service Punjab

- The weekly trend of international prices of mash sourced from the Global Pulses Confederation, depicted decrease in international prices of Mash from USD 870/ton to USD 865/ton during last two weeks.



Source: Global Pulses Confederation

- Monthly average retail price of mash in Punjab is recorded at Rs. 393/kg during August. As a result of stable international prices of Masoor, its local price is also depicting declining trend.





Price Control & Commodities Management Department



SUPPLY MANAGEMENT ADVISORY



Assessment

Mash production in Pakistan remains negligible, generating the country heavily dependent on imports to satisfy domestic consumption requirements. With slight decrease in international prices of mash, the local market is also witnessing a slight downward trend in prices.

Forecast

As a result of declining international prices, its import is smooth. Thus, local supply of mash is stable and resultantly its price is anticipated to remain stable in local markets. Local prices of gram and moong have decreased leading to increase in their demand, resultantly price of mash is also declining due to substitute effect.



Advisory



- All Deputy Commissioners across Punjab must consider drop in international prices of Mash in DPCC meeting while fixing prices in their respective district to transfer relief to common man.
- District Administration with the help of Price Control Magistrates should ensure regular inspections of retailers for strict implementation of retail notified retail rates. Moreover, stock situation also be monitored regularly.
- Moreover, the Agriculture Department must take prompt measures to expand the area under cultivation of mash and promote the use of climate-resilient and drought-tolerant varieties to enhance local production.

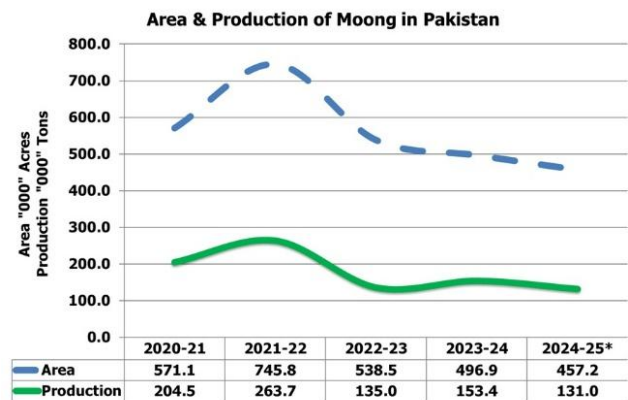


7. MOONG

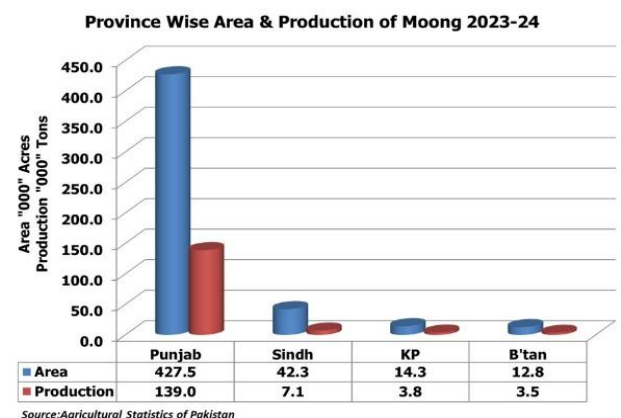
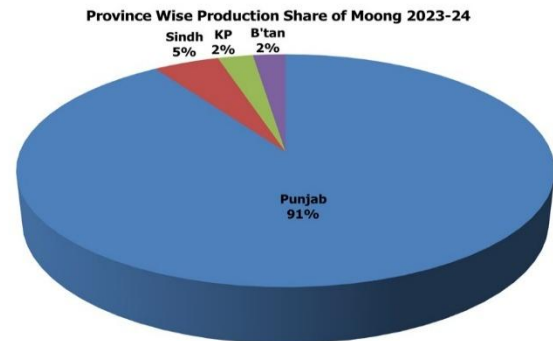


NATIONAL OVERVIEW

- The cultivated area and domestic production of moong have exhibited noticeable fluctuations over the years, highlighting instability in its cultivation trends across the country.
- During year 2024–25, domestic production of moong is estimated at 131,000 tons, reflecting a 14.6% decline compared to the previous year and 35.9% decrease relative to year 2020–21.
- Likewise, cultivated area of moong has also declined to 4,57,200 acres, indicating a 7.9% decrease from the previous year and a 19.9% decline in contrast with year 2020–21.
- Punjab continued to dominate in production, contributing 91% of the national output, followed by Sindh (5%), Balochistan (2%) and Khyber Pakhtunkhwa (2%).
- Punjab stands as leading moong producing province with production of 139,000 tons harvested from 4,27,500 acres. Sindh comes in 2nd rank with an output of 7,100 tons, while KP secured third place with 3800 tons. Balochistan recorded the lowest moong production at 3,500 tons.



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



Source: Agricultural Statistics of Pakistan

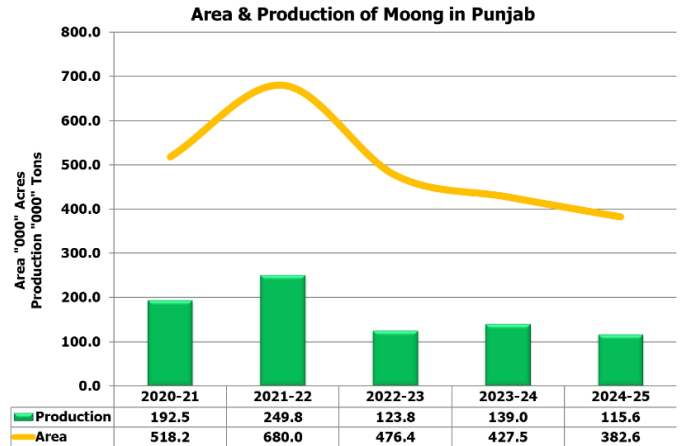


Price Control & Commodities Management Department



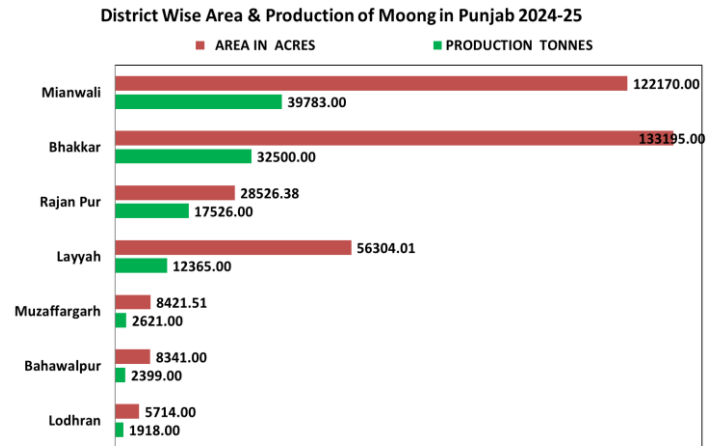
PROVINCIAL OVERVIEW

- Area and production of moong in Punjab are exhibiting instability and gradually declining trend over the years.
- During year 2024-25, production of moong has been recorded at 1,15,600 tons showing 16.8% decrease over the last year and 39.94% decrease in contrast with year 2020-21. Similarly, cultivated area is recorded at 3,82,600 acres which is 10.5% less as compared to previous year and 26.16% decrease relative to area recorded in year 2020-21.



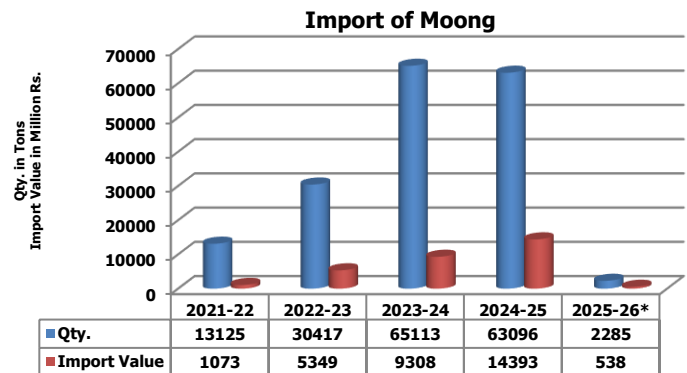
Source: Agricultural Statistics of Pakistan & Crop Reporting Service Punjab

- In Punjab key producing districts of moong are Mianwali, Bhakkar, Rajanpur, Layyah, Muzaffargarh, Bahawalpur, and Lodhran, etc.
- During year 2024-25, domestic production of moong has been recorded at 1,31,000 tons which is comparatively less than consumption requirement of moong i.e. 2,02,860 tons, resulting in a supply deficit of 71,860 tons.



Source: Crop Reporting Service Punjab

- To overcome this supply gap, the country needs imports to meet domestic consumption requirements.



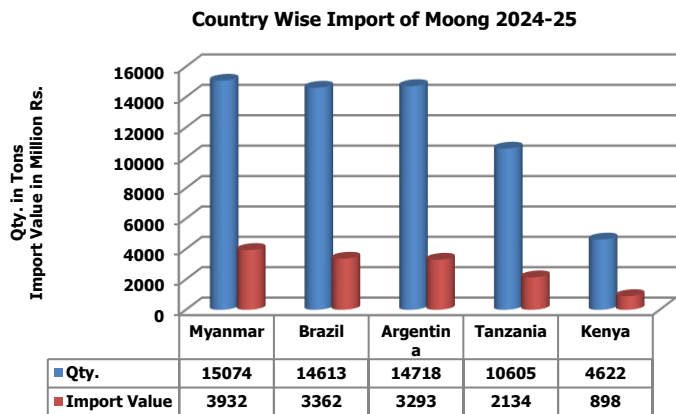
Source: PBS & Pakistan Single Window



Price Control & Commodities Management Department

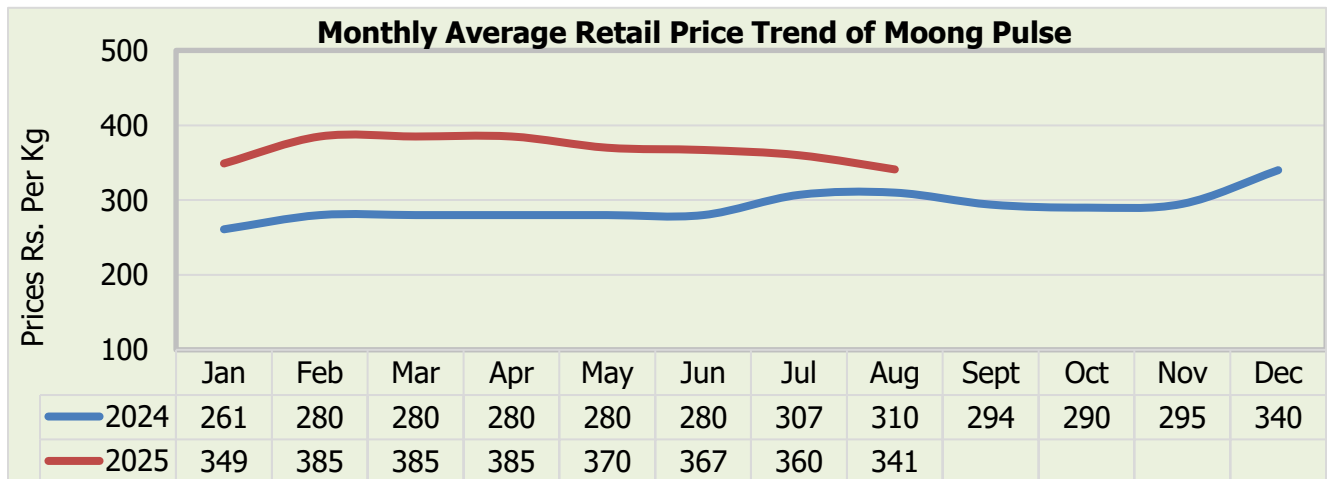


- During year 2024–25, Pakistan has imported 63,096 tons of moong at an expense of Rs. 14,393 million. However, during year 2025-26 (July), moong imports stood at 2285 tons, in lieu of Rs. 538 million.
- The major countries from where Pakistan primarily arranges its moong imports include Myanmar, Brazil, Argentina, Tanzania and Kenya.



Source: PBS & Pakistan Single Window

- Local fresh crop of moong is arriving in local market, which has stabilized the supply situation and its price is exhibiting decline trend in local markets. In August-2025, the monthly average retail price of moong in Punjab stood at Rs. 341 per kilogram.



SUPPLY MANAGEMENT ADVISORY



Assessment

Local production season of moong is in progress. Resultantly, supply situation of moong is improving and subsequently price is exhibiting downfall in local markets. Due to availability of local crop, price of moong has decreased from Rs.360/Kg to Rs.341/Kg, showing 5.2% decrease over the last month.



Price Control & Commodities Management Department



Forecast

As a result of commencement of local production of season, supply situation of moong is anticipated to be normal, thus its prices are expected to decline further in local markets.



Advisory



- All Deputy Commissioners may ensure that impact of availability of local crop of moong should be apparent in terms of declining trend in local prices and this factor may be considered while fixing prices through DPCC meeting.
- The District Administration should ensure true implementation of retail notified rates through regular and strict monitoring of retailers by Price Control Magistrates.
- PAMRA Authority with help of Market Committees should coordinate with commission agents and traders to ensure smooth supply of moong to keep its price on lower side.

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