



Price Control & Commodities
Management Department

Food in Focus Market Analysis Report

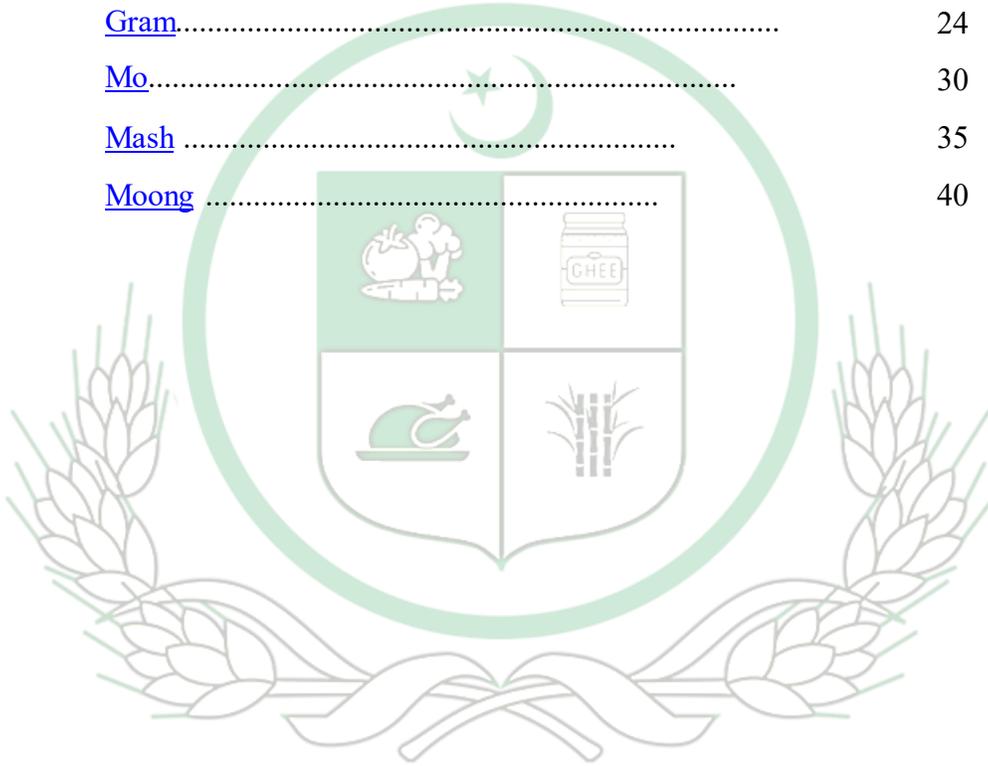
December 2024





CONTENTS

Potato	3
Tomato	10
Onion	17
Gram	24
Mo	30
Mash	35
Moong	40





PREFACE

We are pleased to present the second edition of monthly market bulletin “**Food in Focus: Market Analysis Report**”, which builds upon the success and insights of the first edition, published last month. The positive reception of the first edition has been truly gratifying, and we are grateful for the overwhelming feedback from our readers. The report’s comprehensive analysis of the local as well as global food market landscape was met with enthusiasm, providing valuable insights into trends, challenges, and opportunities within the ever-evolving food market.

In the first edition, we focused on variety of elements, such as detailed analyses of market trends, insights into seasonal variations, and assessments of regional supply chain performance. By synthesizing this information, the bulletin aims to equip stakeholders with practical guidelines and strategic recommendations. This foundational information and analysis was pivotal in helping businesses make informed decisions and navigate the complexities of a rapidly changing market. We are proud to say that the first edition laid a strong foundation for understanding the dynamics of the food market, and its relevance has only grown as the market continues to develop.

As we move into the second edition, we have expanded our scope, incorporating the latest data, trends, and forecasts for the months ahead. This new edition reflects recent shifts in supply chain with specific proposals for Deputy Commissioners to ensure sustainable supply chain in their respective districts. We have also deepened our analysis of international markets and specific commodities, offering a more nuanced view of both global and local food market trends.

With data-driven insights, the second edition of the “**Food in Focus: Market Analysis Report**” aims to provide even more precise, actionable guidance for administration seeking to navigate the complexities of an evolving market. We trust that the findings will empower stakeholders to make informed decisions and seize new opportunities in a rapidly transforming food market. It is our hope that **Food in Focus** continues to serve as an essential resource for those looking to stay ahead in the competitive food market landscape.

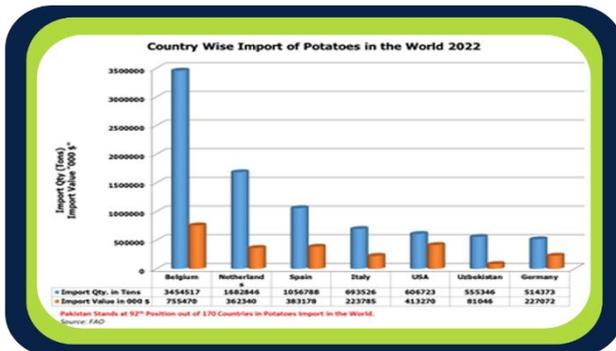
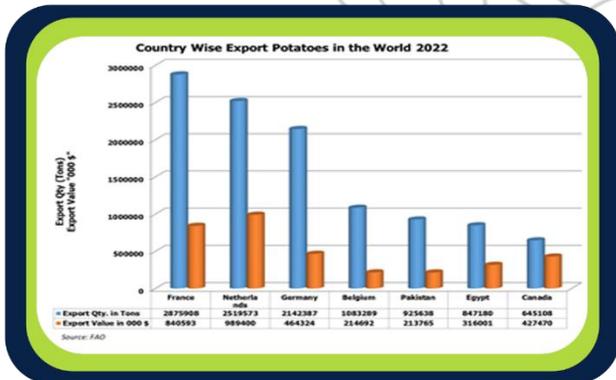
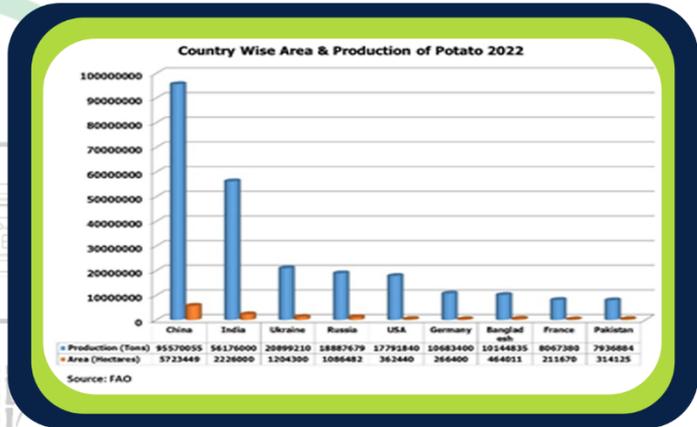
Thank you for your continued support, and we look forward to the ongoing journey of food market innovation and growth.

Potato



GLOBAL OVERVIEW

- The potato, a staple crop, is cultivated in nearly every country worldwide, with the largest producers located in Asia, Europe, and North America.
- Historically, the highest levels of potato consumption have been recorded in China, India, Ukraine, and Russia, which are both major producers and consumers of the crop.
- Global annual potato consumption regularly exceeds 350 million metric tons.
- According to FAO data, global potato production in 2022 was approximately 375 million metric tons.
- Key potato-producing countries include China, India, Ukraine, Russia, and the United States, with China leading production, while Pakistan ranks ninth in production.
- The demand for potatoes varies significantly across different countries.

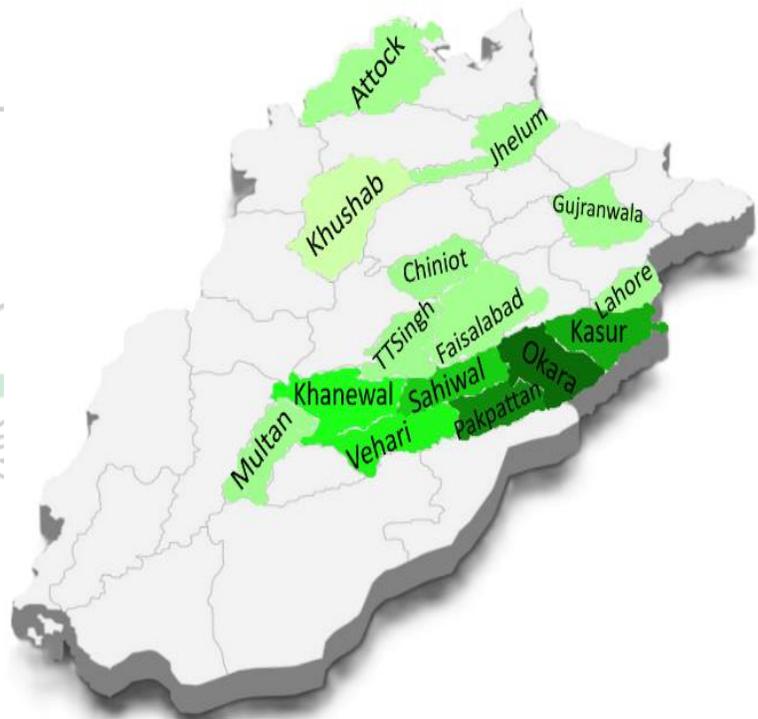
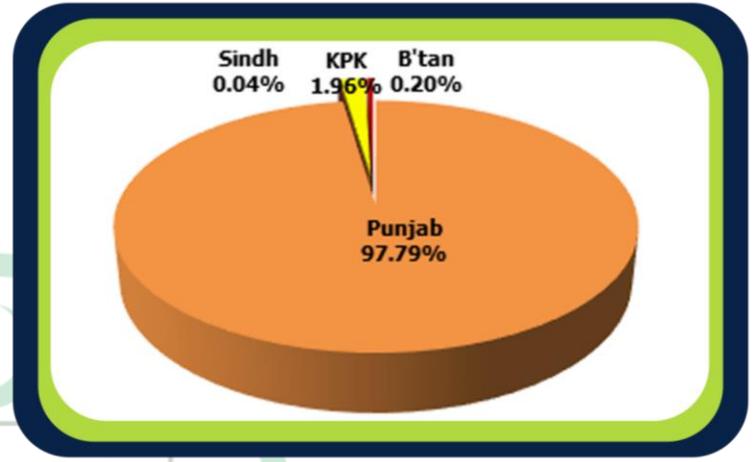


- Countries engage in exports based on their domestic consumption needs and production capabilities.
- FAO data for 2022 indicates that France was the leading exporter, with a volume of 2.875 million tons, valued at USD 840 million.
- Pakistan ranked fifth among major exporters, shipping 925,638 tons and generating USD 213 million in foreign exchange.
- Among the leading importers, Belgium ranked first with the highest import volume of 3.45 million tons, followed by the Netherlands, Spain, Italy, the United States, Uzbekistan, and Germany.
- These countries are major importers of both fresh potatoes and processed potato products, driven by consumer demand and the expansion of fast food chains.



NATIONAL OVERVIEW

- Pakistan ranks among the largest producers of potato in Asia. The province of Punjab is the dominant contributor to national potato production, accounting for 97% of the total output. In comparison, Khyber Pakhtunkhwa (KPK) contributes 1.96%, while Balochistan and Sindh account for 0.20% and 0.04%, respectively.
- In the 2023-24, Pakistan achieved a record potato production of 8.2 million tons, marking a 1.2% increase compared to the previous year. With this surplus production, Pakistan has become self-sufficient in meeting its domestic consumption needs and consistently exports a significant quantity of potato to other countries annually.
- According to the per capita consumption data fetched from the Pakistan Bureau of Statistics, the domestic consumption requirement for potato was 3,680,451 tons. In contrast, domestic production for the 2023-24 year was recorded at 8,434,370 tons, ensuring that the country is self-sufficient in meeting its domestic consumption needs.





PROVINCIAL OVERVIEW

- The major potato-producing districts in Punjab include Okara, Pakpattan, Kasur, Sahiwal, and Vehari.

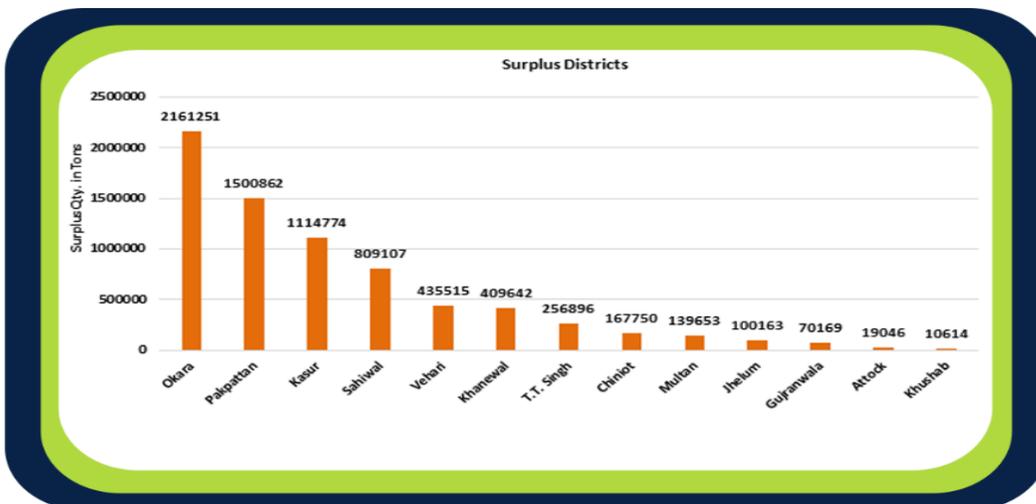
Punjab District	Production (Tons)
Punjab District	Production (Tons)
Okara	22,14,827
Pakpattan	15,33,417
Kasur	11,77,019
Sahiwal	8,53,026

- The potato production season in Punjab begins in November and continues through June. This is followed by the production season in Khyber Pakhtunkhwa (KPK), which runs from July to November. In Balochistan, the production season starts in August and lasts until October. Subsequently, potatoes from Sindh are available from December to January.

Supply Cycle of Potato

Province	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Sindh	2,849 Tons (0.03%)											
Punjab	82,36,260 Tons (97.65%)											
KPK							1,58,286 Tons (1.88%)					
Baluchistan								36,975 Tons (0.44%)				

- District-wise potato production data for Punjab indicates that only 13 districts are surplus producers. These include Okara, Pakpattan, Kasur, Sahiwal, Vehari, Khanewal, T.T. Singh, Chiniot, Multan, Jhelum, Gujranwala, Attock, and Khushab. Among these, Okara, Pakpattan, Kasur, and Sahiwal contribute the largest share to the province's overall potato production. The surplus-producing districts are depicted below:

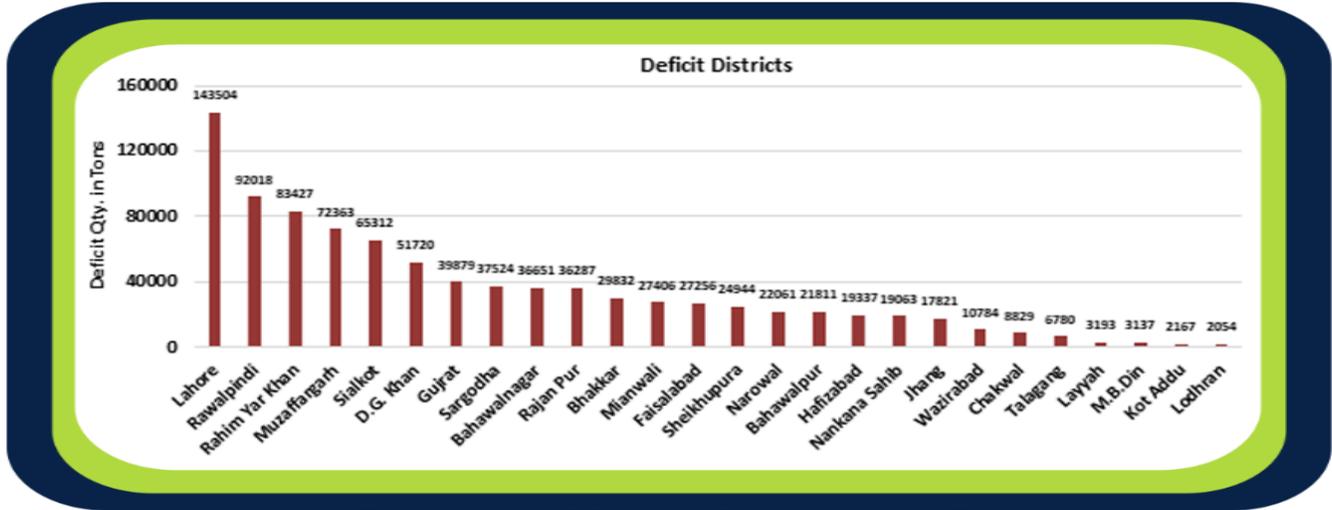




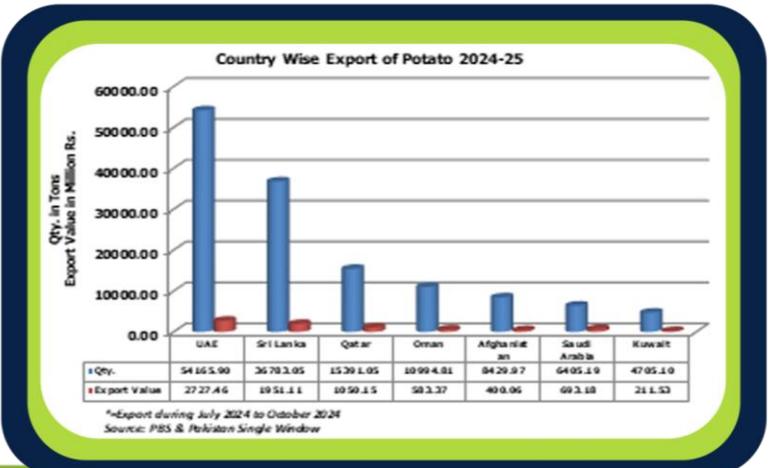
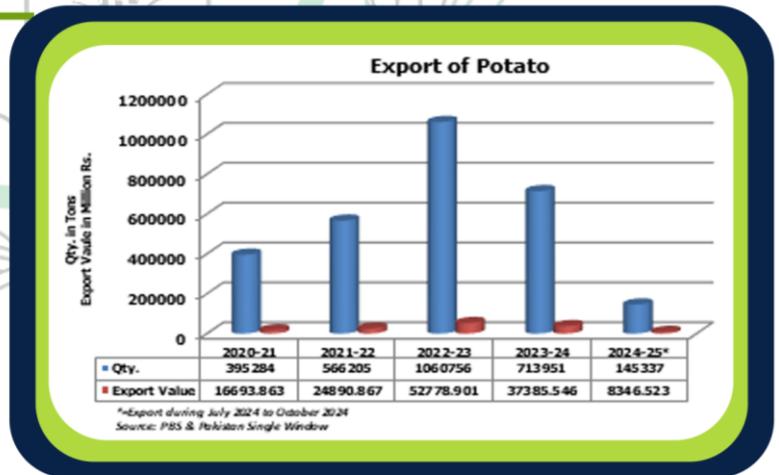
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- The remaining districts are in deficit with respect to their consumption requirements. However, the total potato production in the province is adequate to meet the domestic consumption needs, with the highest share in overall production. The districts experiencing a deficit are graphed below:

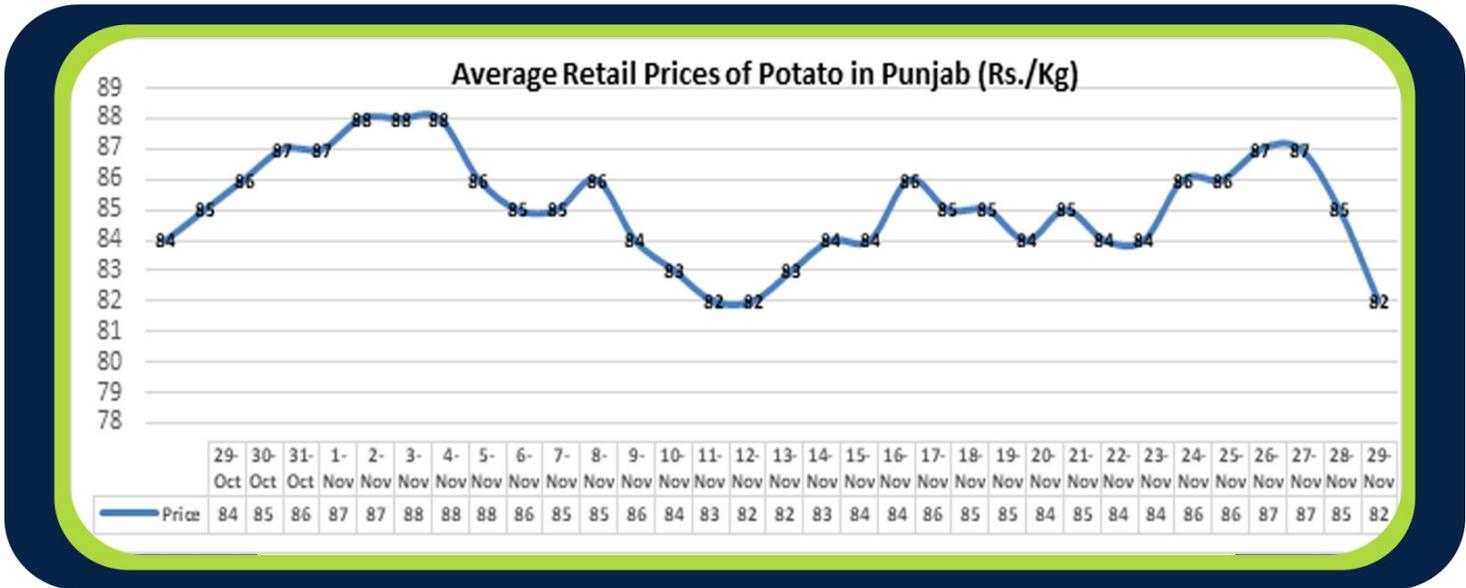


- The surplus potato production in the country not only satisfies domestic consumption requirements but also creates an opportunity to generate foreign exchange reserves through the export of excess potatoes to other countries.
- From 2020-21 to 2022-23, potato exports continued to increase. However, in the 2023-24, exports experienced a slight decline.
- In the 2023-24 fiscal year, potato exports were recorded at 713,951 tons, valued at Rs. 37,386 million. However, from July to October in the 2024-25 period, potato exports amounted to 1,45,337 tons, with a value of Rs. 8,347 million.
- Main countries, where our potato is exported are Afghanistan, Sri Lanka, UAE, Malaysia, Qatar, Oman and Bahrain, etc.





- The average retail prices of potatoes in Punjab almost remained stable with slight fluctuations over the previous month. However, the supply of fresh potatoes has begun and is expected to reach full capacity by December 2024, at which point prices are anticipated to return to their normal range.



RAMADAN-2025 REQUIREMENTS

- It is commonly observed that consumption of potato exhibits flagrant increase during Holy month of Ramadan each year being added in most of Iftar cuisines. As a result of high demand, sufficient supply of potato is required to meet the demand and keep prices within reasonable limits. As an estimate, consumption of potato swings up to double in the month of Ramadan as compared to normal months, accordingly provincial consumption requirement for potato has been carved out as under:

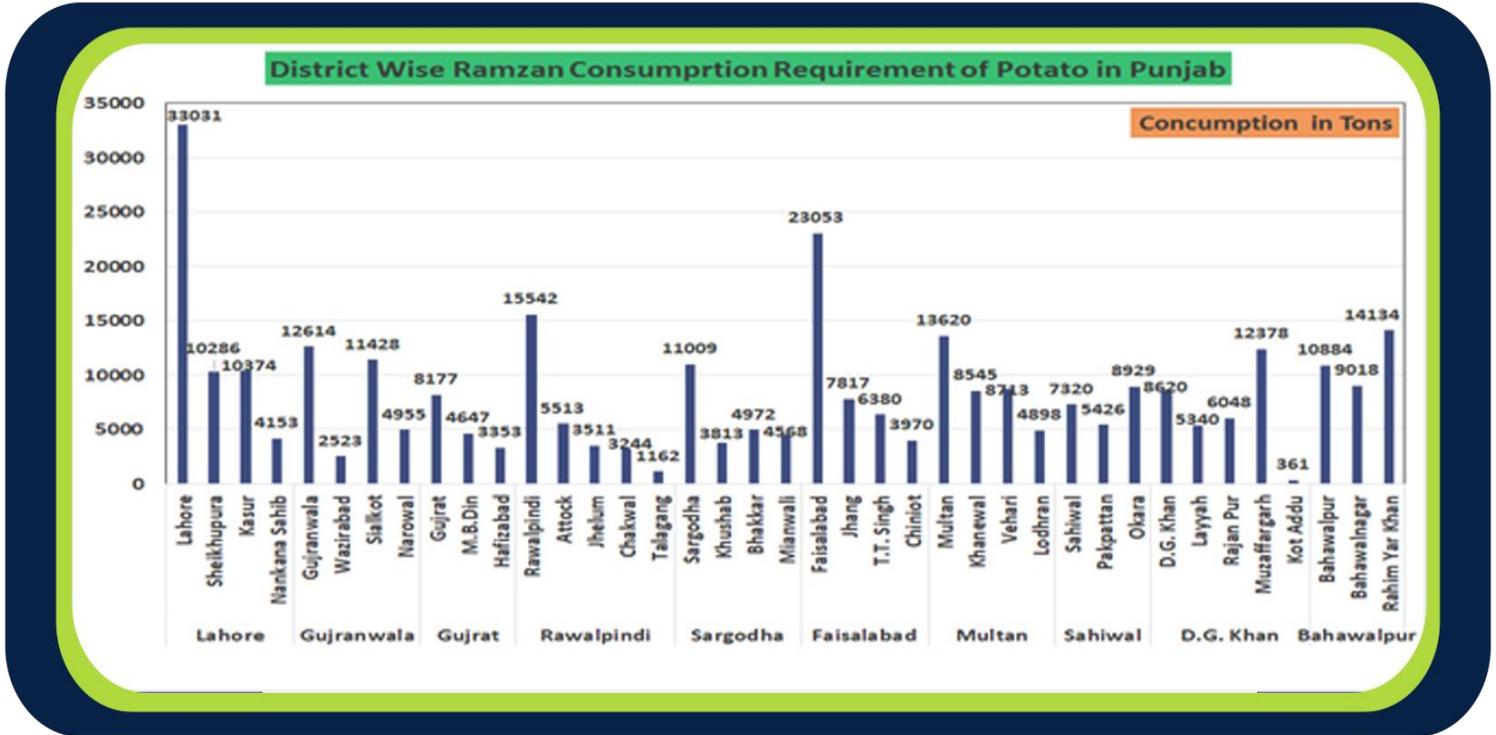
Annual Provincial Consumption Requirement (Tons)	Monthly Provincial Consumption Requirement (Tons)	Ramzan-2025 Provincial Consumption Requirement (Tons)
19,45,979	1,62,165	3,24,330



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District wise consumption requirement of potato for month of Ramadan-2025 is given as under:



POTATO OUTLOOK

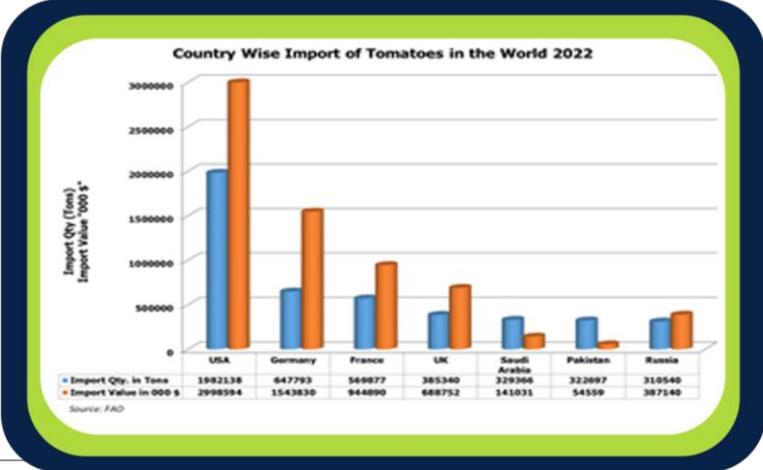
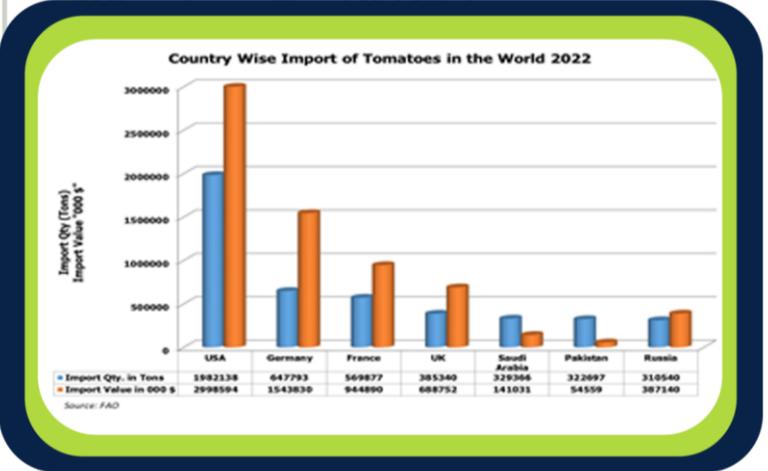
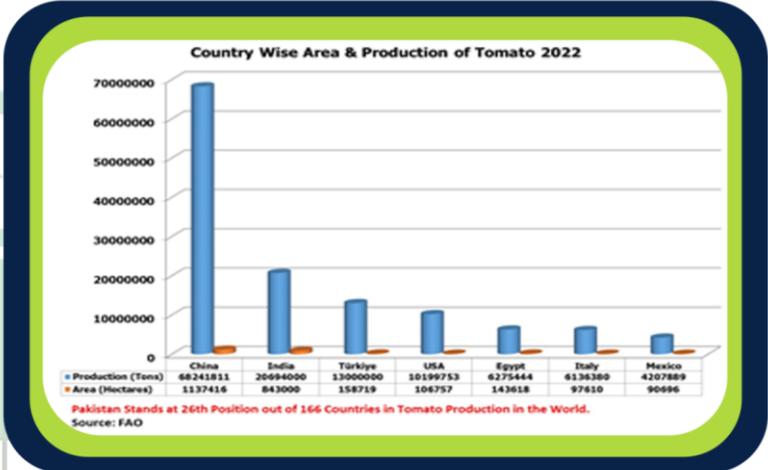
<p>Assessment</p> 	<ul style="list-style-type: none"> • The local production season has commenced. • Supply of fresh potato is being sourced from Khushab, Attock, Sialkot and Gujranwala along with from core areas especially Okara, Pakpattan, Kasur and Sahiwal , etc. • As an estimate, provincial consumption requirement of potato during Ramadan-2025 is likely to be 3,24,330 tons, which would be double than a normal month's requirement.
<p>Forecast</p> 	<ul style="list-style-type: none"> • With the commencement of the local production season, the supply of potato is steadily improving. • In December, both supply and pricing are expected to stabilize due to the sufficient arrival from the core production areas. • Over the next 10-15 days, potato prices are likely to decrease further as local supply reaches at its full capacity. • During Ramadan 2025, the supply and price of potato are expected to remain stable, owing to the availability of the fresh local crop in the province.
<p>Advisory</p> 	<ul style="list-style-type: none"> • Deputy Commissioners (DCs) of deficit districts, such as Lahore, Rawalpindi, Rahim Yar Khan, and Muzaffargarh, should ensure the maximum supply of potato by collaborating with EADA (E&M) and the Secretaries Market Committees from surplus producing districts like Okara, Pakpattan, Kasur Sahiwal, Khushab, Attock, Sialkot & Gujranwala, in accordance with demand of Ramadan-2025, while maintaining close coordination with commission agents and traders. • DCs should arrange stocks keeping in view their requisite consumption requirement of potato during Ramadan-2025. • Strict monitoring of auctions should be enforced to ensure the transparent determination of daily rates.

TOMATO



GLOBAL OVERVIEW

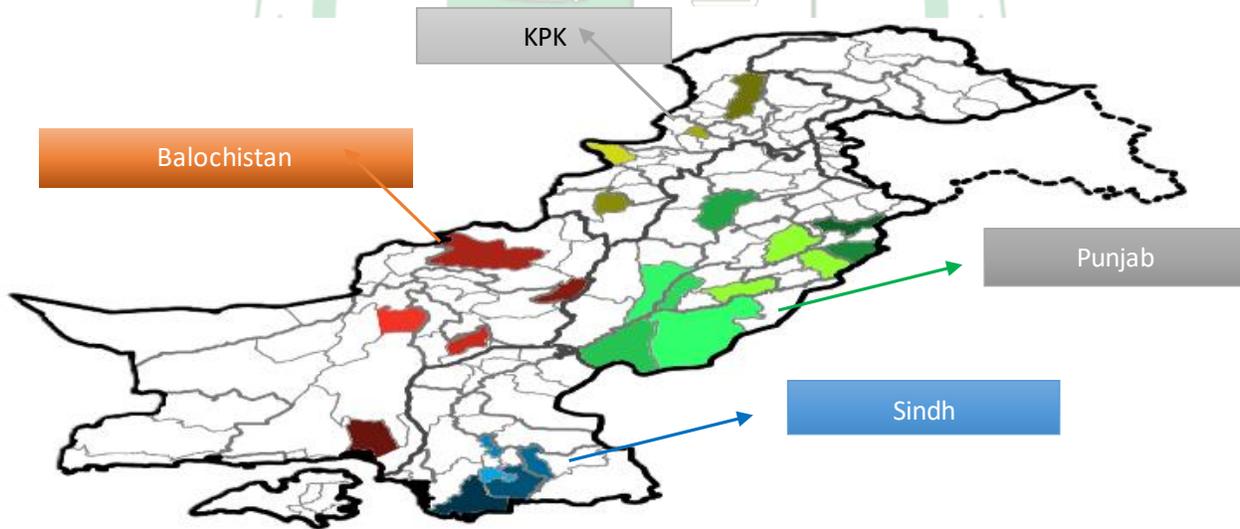
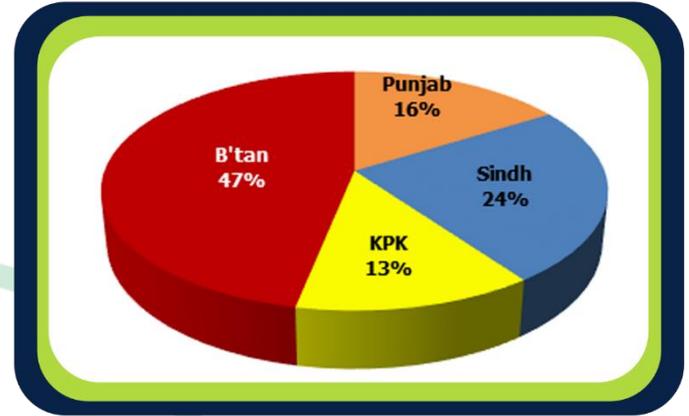
- Tomatoes are consumed worldwide in both fresh and processed forms. The growing demand for processed tomato products, including ketchup, sauces, and canned tomatoes, has contributed to an increase in consumption.
- Global tomato production has reached 186.82 million tons, cultivated across a total area of 5 million hectares, resulting in an average yield of 36.97 tons per hectare (FAO, 2022).
- Globally, China is ranked first in tomato production, with a total output of 68 million tons, and also held the largest cultivated area, covering 1.137 million hectares.
- Following China, India is the second-largest producer of tomatoes, with Türkiye, the USA, Egypt, Italy, and Mexico ranking next.
- Mexico, the Netherlands, Morocco, Spain, Türkiye, Iran, and France are among the leading global exporters of tomatoes.



- The USA leads the list of major tomato importing countries, with the highest import volume of 1.92 million tons, followed by Germany, France, the UK, Saudi Arabia, Pakistan, and Russia.
- These countries are key importers of both fresh and processed tomatoes, driven by consumer demand and the expansion of fast-food chains.

NATIONAL OVERVIEW

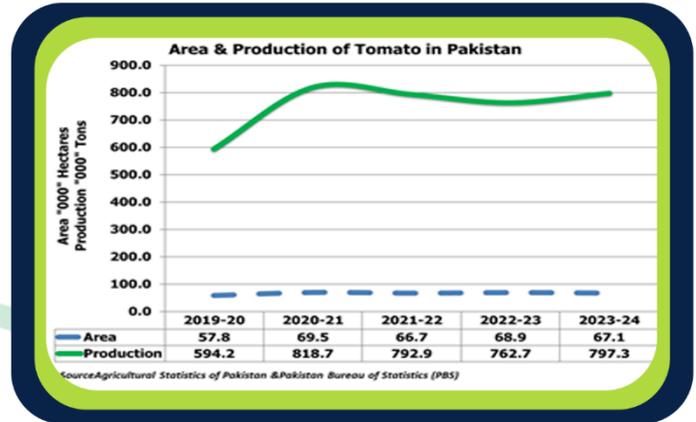
- Tomatoes are cultivated across all provinces of the country, with Balochistan being the leading producer, accounting for 47% of the domestic tomato production. It is followed by Sindh (24%), Punjab (16%), and Khyber Pakhtunkhwa (13%).
- Due to seasonal variations, tomato supply is consistently available from different provinces, according to their respective production seasons throughout the year.



- Major producing districts of tomato in all provinces are listed below:

Balochistan		Sindh		Punjab		KPK	
Districts	Production (Tons)	Districts	Production (Tons)	Districts	Production (Tons)	Districts	Production (Tons)
Lasbela	1,21,790	Thatta	90,749	Sheikhupura	24,719	Swat	48,782
Barkhan	94,849	Badin	24,222	Kasur	21,118	Tank	16,574
Killa Saifullah	38,325	Mirpurkhas	12,208	Khushab	13,988	Malakand	11,150
Nasirabad	37,385	Matiari	9,481	R.Y.Khan	13,942	Charsada	6,243
Kalat	14,998	T.M.Khan	9,317	Multan	8,761	Kurram	5,592

- Domestic tomato production has not seen significant growth over the past three years, resulting in a shortfall between production and consumption requirements.
- The total domestic tomato production for the year 2023-24 was recorded at 797,335 tons, which is significantly lower than the domestic consumption of 1,477,977 tons. As a result, tomato imports remain essential to meet consumption demands throughout the year.



- As per the tomato supply cycle, supply from Sindh is available from December to April, followed by the start of supply from Punjab in April, which continues until June. Subsequently, the production season in Khyber Pakhtunkhwa and Balochistan begins in June and lasts until November.

Supply Cycle of Tomato

Province	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Sindh	1,90,867 Tons (23.94%)											
Punjab				1,28,579 Tons (16%)								
KPK						104,414 Tons (13.10%)						
Baluchistan						3,73,475 Tons (46.84%)						

PROVINCIAL OVERVIEW

- A district-wise analysis of tomato production reveals that tomatoes are grown throughout the entire province. However, all districts are facing a production shortfall relative to their consumption requirements. The details of the production deficit by district are provided below:





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- As a result, supply is under pressure, leading to a rise in the average retail price of tomatoes in local markets. However, supply of tomato from Sindh has been commenced which will be on full swing during December-2024, resultantly stress in supply is expected to reduce leading to decline in markets prices of tomato.



RAMADAN-2025 REQUIREMENTS

- Tomato being essential ingredient of culinary, experiences high demand during month of Ramadan. As tomato is a perishable item which does not allow its storage, therefore smooth supply of tomato could only be ensured from core supply areas. During Ramzan-2025, local crop will not be available but production season in Sindh will be in progress, resultantly provincial requirements of tomato will be met through supply from Sindh. As an estimate, demand of tomato swells by one and half times in contrast to demand during normal month. In order to ensure smooth supply of tomato during Ramadan-2025, consumption requirement of tomato during Ramzan-2025 has been ascertained as under:

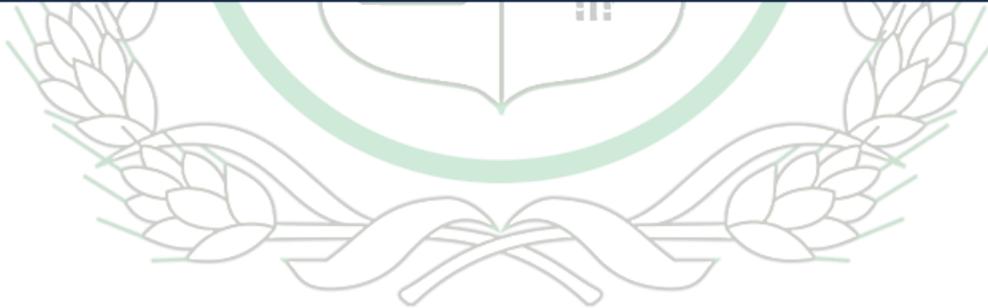
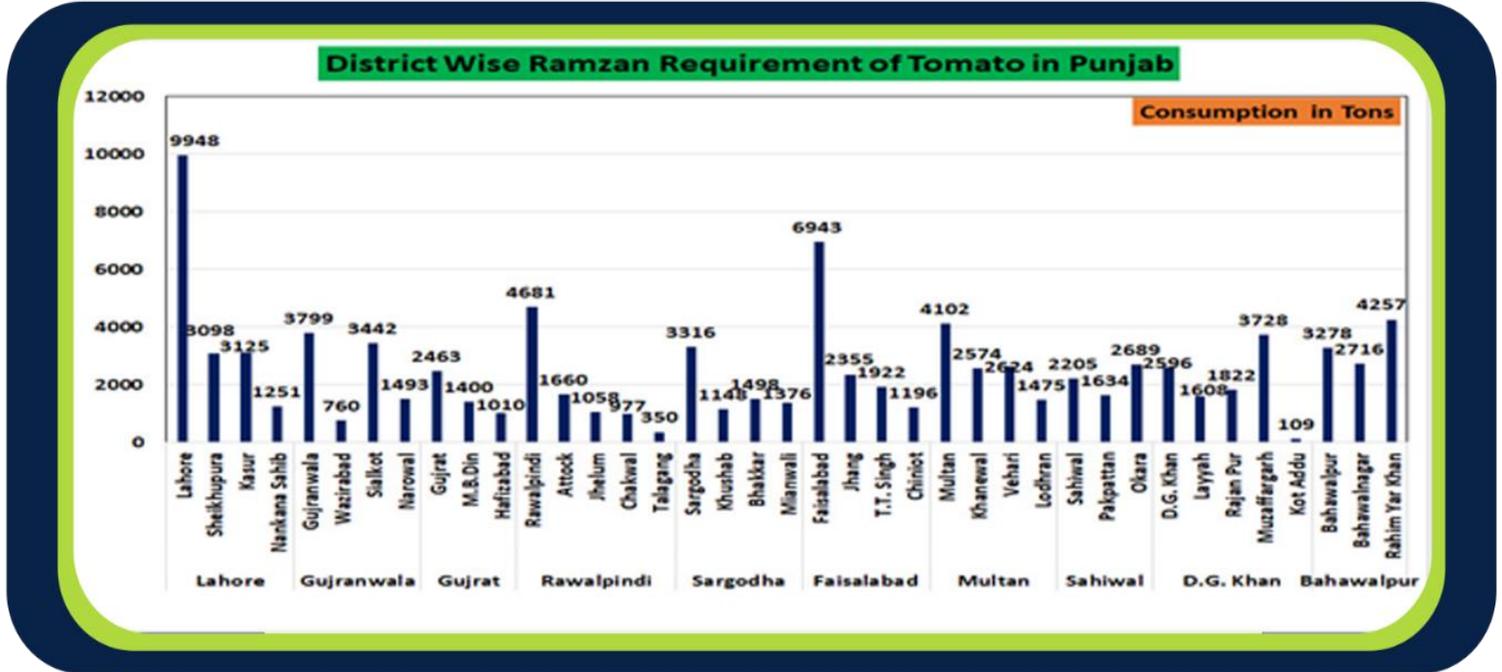
Annual Provincial Consumption Requirement (Tons)	Monthly Provincial Consumption Requirement (Tons)	Ramzan-2025 Provincial Consumption Requirement (Tons)
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- District wise consumption requirement of tomato during Ramadan-2025 is determined as under:



TOMATO OUTLOOK

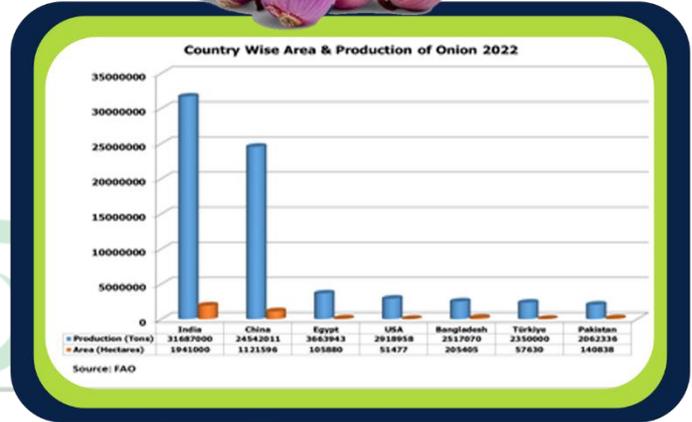
<p>Assessment</p> 	<ul style="list-style-type: none"> The primary sources of tomato supply are Khyber Pakhtunkhwa (KPK) and Afghanistan. However, supply from both sources of arrival i.e KPK and Afghanistan has sharply declined, leading to stress supply and price hike of tomato. The production season of tomato in Sindh has been started and arrival from Sindh is improving gradually which will provide cushion to the prevailing stress supply & price situation. Supply from Sindh will be at its peak during mid-December 2024 In the year 2024-25 (July-October), a total of 304,212 tons of tomatoes were imported. Local supply will be accessible from April to June 2025, following Ramadan 2025. <p>Provincial consumption requirement of tomato is expected to be 97,682 tons during Ramdan-2025 which will turn to be 1.5 times high as compared to normal month.</p>
<p>Forecast</p> 	<ul style="list-style-type: none"> Tomato prices are expected to turn down after mid-December 2024 on account of bulk arrival from Sindh. During Ramadan 2025, Punjab will rely solely on supply from Sindh, the second-largest tomato-producing province. Imports from Afghanistan will not be available during Ramadan 2025 due to the end of production season.
<p>Advisory</p> 	<ul style="list-style-type: none"> EADAs (E&M) and Secretaries MC should facilitate maximum supply from Sindh through futures contracts with the assistance of commission agents, under the supervision of Deputy Commissioners (DCs). DCs should line up arrangements in consultation with commission agents to meet the consumption requirement and keep prices on normal side during Ramadan-2025. Strict monitoring of auctions should be enforced to ensure transparent determination of daily rates.

ONION

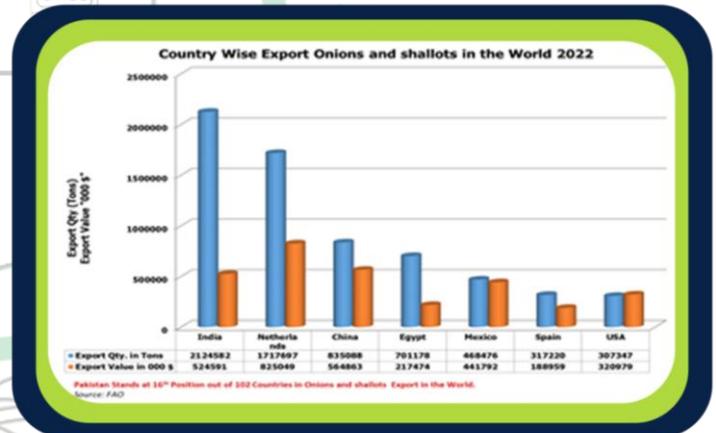


GLOBAL OVERVIEW

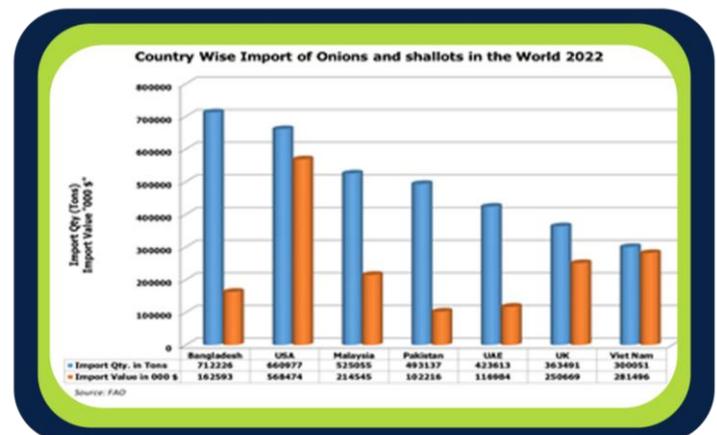
- Onion is grown worldwide, with India leading global production at 31.6 million tons. It is followed by China, Egypt, USA, Bangladesh, Türkiye, and Pakistan etc.
- Pakistan is 7th largest producer of onion having production of 2.06 million tons and acreage of 140,838 hectares.



- As the largest producer, India also tops the list of major onion exporters globally.
- In 2022, India exported 2.12 million tons of onions, valued at USD 524.5 million.
- Following India, other major importing countries include the Netherlands, China, Egypt, Mexico, Spain, and the USA, among others.

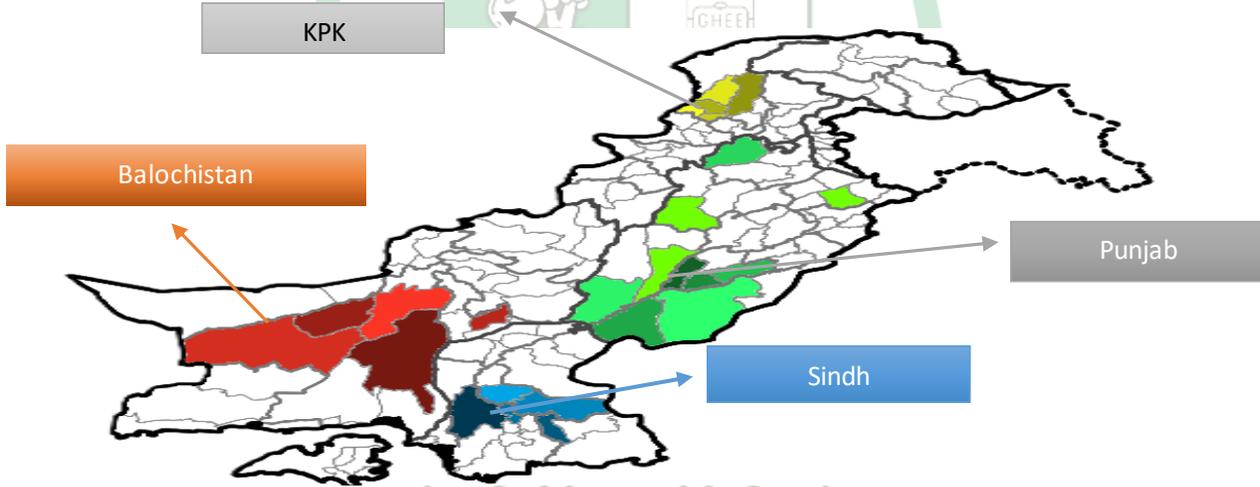
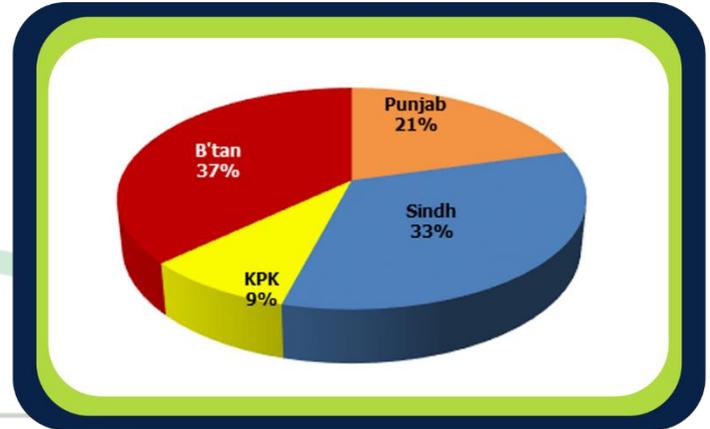


- Among the major importing countries, Bangladesh is the largest importer of onions globally.
- In 2022, Bangladesh imported 712,226 tons of onions, with an import value of USD 162.5 million.
- Pakistan ranks 4th among onion-importing countries, with an import volume of 493,137 tons, valued at USD 102.2 million.



NATIONAL OVERVIEW

- Similar to tomato, onion is also cultivated and produced across all provinces of the country. Balochistan is the largest producer, accounting for 37% of the domestic onion production. It is followed by Sindh, the second-largest producer with a 33% share, then Punjab (21%) and Khyber Pakhtunkhwa (9%). Due to seasonal variations, onion supply is consistently available from different provinces according to their respective production seasons throughout the year.

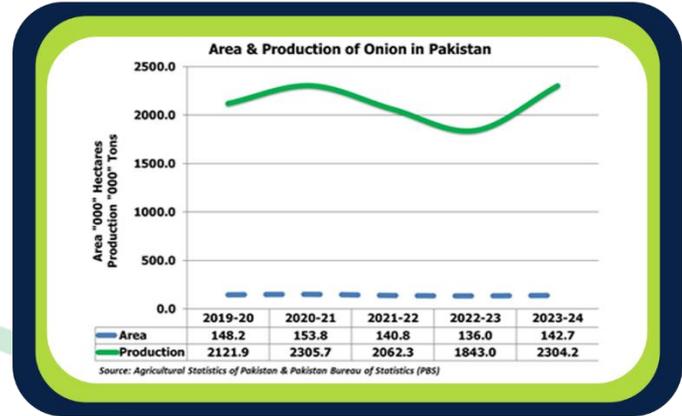


- Major producing districts of onion in all provinces are listed below:

Balochistan		Sindh		Punjab		KPK	
Districts	Production (Tons)	Districts	Production (Tons)	Districts	Production (Tons)	Districts	Production (Tons)
Khuzdar	1,07,525	Jamshoro	1,67,978	Multan	81,208	Swat	1,01,755
Kharan	79,970	Mirpurkhas	1,23,494	Lodhran	78,546	Dir Lower	25,407
Nasirabad	63,892	Matiari	1,05,715	R.Y.Khan	47,211	Malakand	16,705
Washuk	53,604	Sanghar	68,534	Vehari	43,931	Dir Upper	16,670
Kalat	51,513	SB Abad	63,204	Attock	41,456	Muhmand	10,326



- Domestic onion production and the cultivated area have shown instability over the past four years, resulting in Pakistan's inability to meet its domestic consumption requirements.
- In the year 2023-24, Pakistan produced 2.3 million tons of onions on an area of 142,700 hectares.
- This production is significantly lower than the domestic consumption of 2.75 million tons, making onion imports necessary to meet the consumption needs throughout the year.



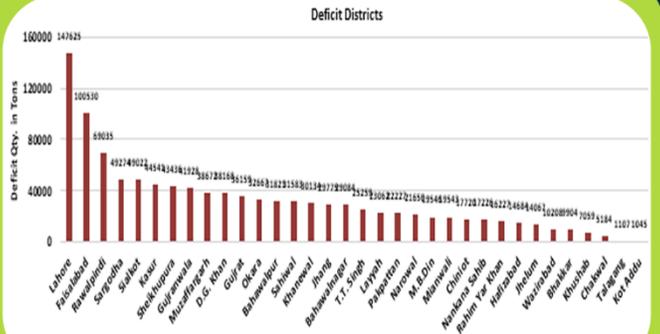
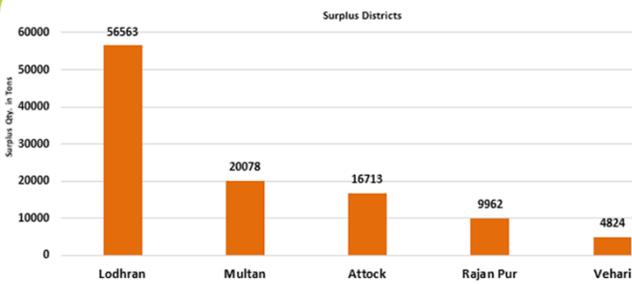
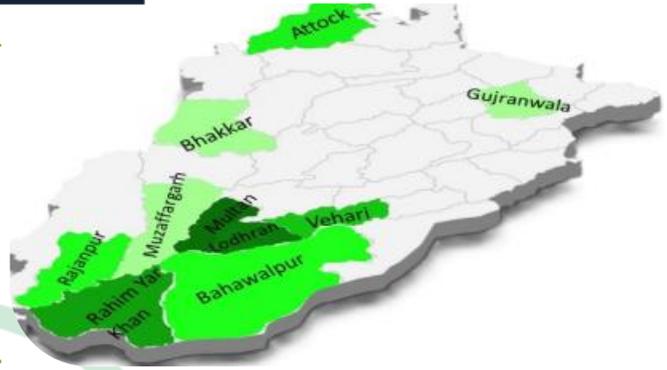
- As per the onion supply cycle, supply from Sindh is available from December to April, followed by the start of supply from Punjab in April, which continues until June. Afterward, the production season in Khyber Pakhtunkhwa and Balochistan begins in June and lasts until November.

Supply Cycle of Onion

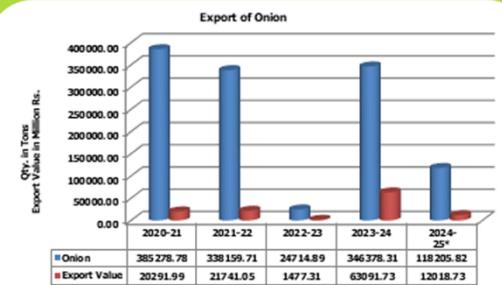
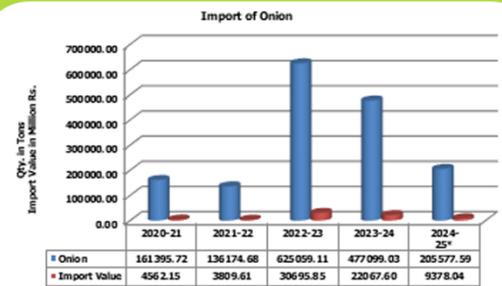
Province	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Sindh	7,71,911 Tons (33.50%)											
Punjab			4,74,621 Tons (20.60%)									
KPK						2,05,257 Tons (8.91%)						
Baluchistan						8,52,387 Tons (36.99%)						

PROVINCIAL OVERVIEW

- A district-wise analysis of onion production and consumption shows that surplus production is observed in only five districts of the province: Lodhran, Multan, Attock, Rajanpur, and Vehari. Among these, Lodhran is the leading district in terms of surplus production.

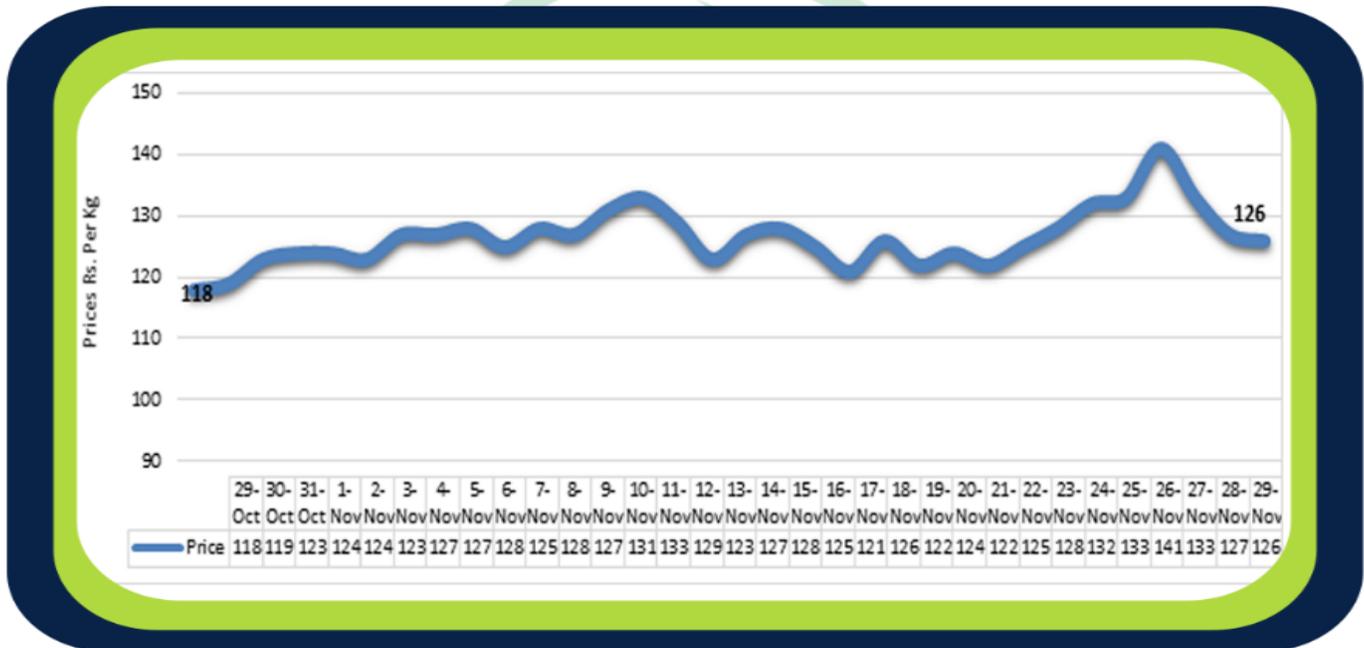


- Due to insufficient domestic production, Pakistan is importing a significant quantity of onions from other countries, depleting foreign exchange reserves.
- In the year 2023-24, Pakistan imported 477,099 tons of onions from countries such as Afghanistan and Iran, at a cost of Rs. 22,068 million.
- In the year 2024-25 (July to October), Pakistan imported 2,05,578 tons of onions from countries such as Afghanistan and Iran, at a cost of Rs. 9,378 million.
- Despite significant imports, Pakistan also participates in onion exports. In the year 2023-24, Pakistan exported 346,378 tons of onions, earning foreign exchange of Rs. 63,092 million. In the year 2024-25, 1,18,206 tons of onions were exported to Malaysia, Sri Lanka, the UAE, and other countries, generating revenue of Rs. 12,019 million.





- Currently, main supply of onion is arriving from Afghanistan and Balochistan, however supply is not as per consumption requirement therefore prices of onion are on higher side in local markets. The production season of onion in Sindh has begun and its supply will improve gradually and accordingly onion prices are expected to come in normal range.



RAMADAN-2025 REQUIREMENTS

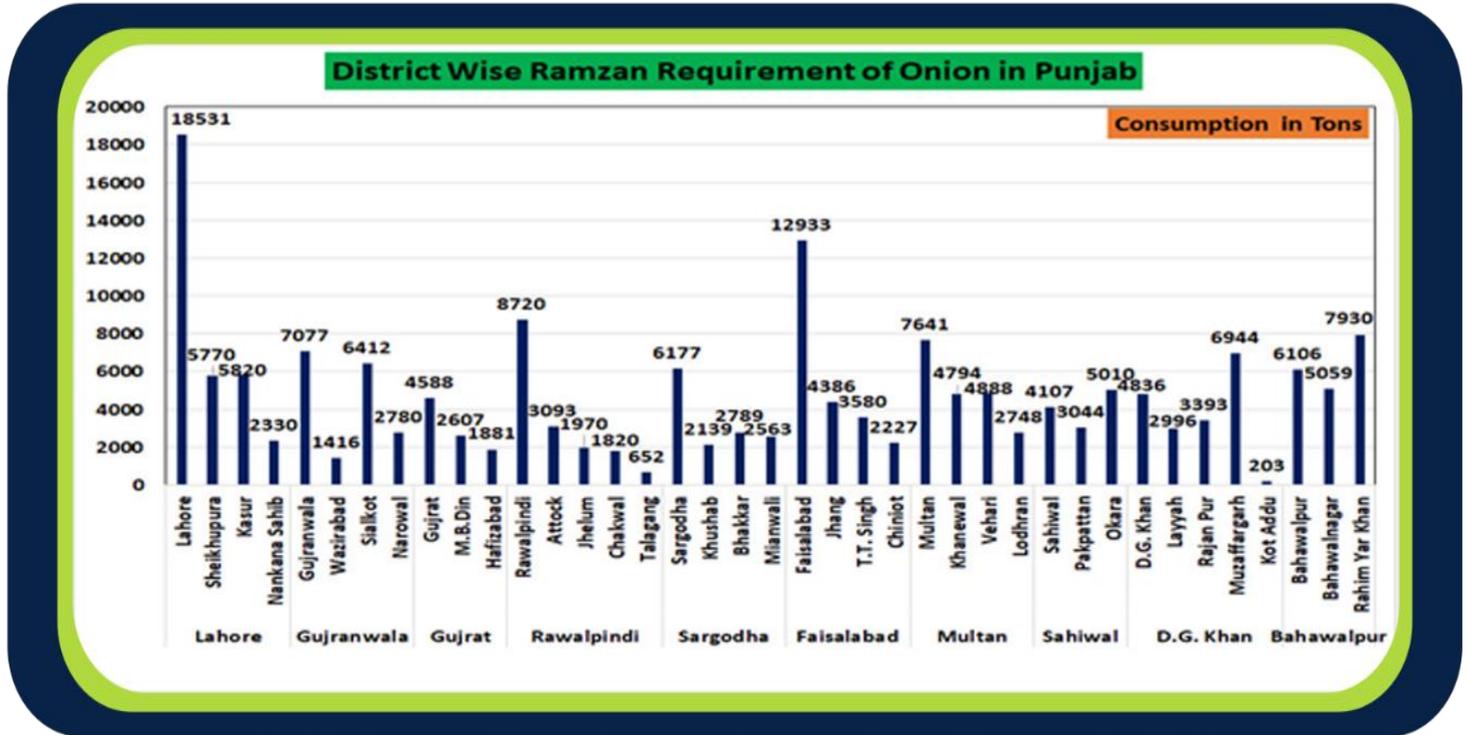
- Traditional cooking in the country remains incomplete without onion. As a result of high demand during Ramadam-2025, consumption requirement of onion appear to be increased by 1.5 times in contrast to normal month's requirement. During Ramadan-2025, demand of onion will be fulfilled through supply from Sindh and Punjab. For making well in time arrangement, consumption requirement of onion during Ramzan-2025 has been estimated as under:



Price Control & Commodities Management Department



- District wise consumption requirement of onion during Ramadan-2025 is determined as under:



ONION OUTLOOK

Assessment



- Onion supply mainly consists of import from Afghanistan as well as arrival from Balochistan.
- Due to supply falling short of demand, prices are on higher side.
- The Sindh crop has started to arrive and will increase gradually, which will improve the supply situation of onion in local markets.
- However, imports will be essential to meet consumption requirements in December 2024.
- In the year 2024-25 (July to October), 205,578 tons of onions were imported, while 118,206 tons were also exported.
- However, during Ramadan 2025, sufficient supply from Sindh will be available, along with the commencement of local production in Rajanpur, Lodhran, and D.G. Khan districts.
- Estimated consumption requirement of onion will be 1,81,957 tons during Ramadan-2025, about 1.5 times higher as compared to normal month.

Forecast



- Production season in Sindh has been commenced.
- Supply from Sindh will reach its full swing till mid-December, 2024, leading to stable supply & price situation thereafter.
- Local production season in Punjab will begin in March, 2025
- During Ramadan-2025, supply of onion will be available in bulk from Sindh and arrival from Punjab will also be started.
- Resultantly, the supply and price of onion are anticipated to be normal during Ramadan-2025.

Advisory



- EADAs (E&M) and Secretaries MC should facilitate imports from Afghanistan until December 2024, with the assistance of importers, traders, and commission agents.
- DCs should monitor the import and local supply situation of onion in collaboration with EADAs (E&M) and Secretaries MC to ensure maximum supply.
- DCs with the help of EADAs (E&M) and Secretaries MC should encourage commission agents to engage in futures contracts for ensuring requisite supply of onion from Sindh during Ramadan-2025.
- Strict auction monitoring should be enforced to ensure the transparent determination of daily rates.

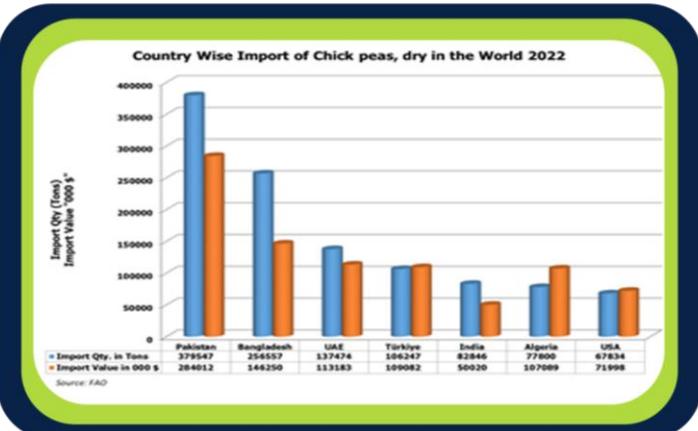
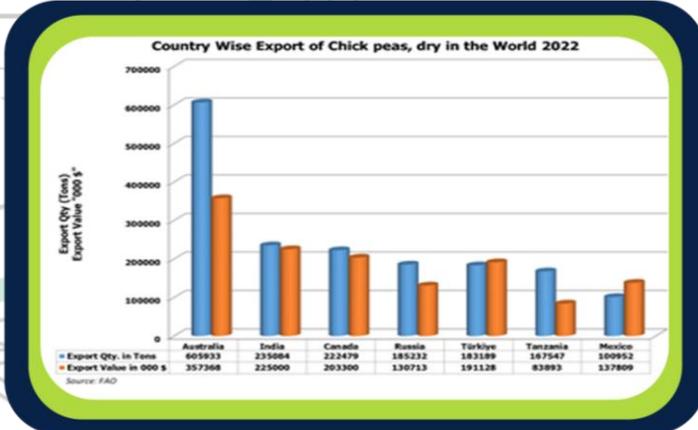
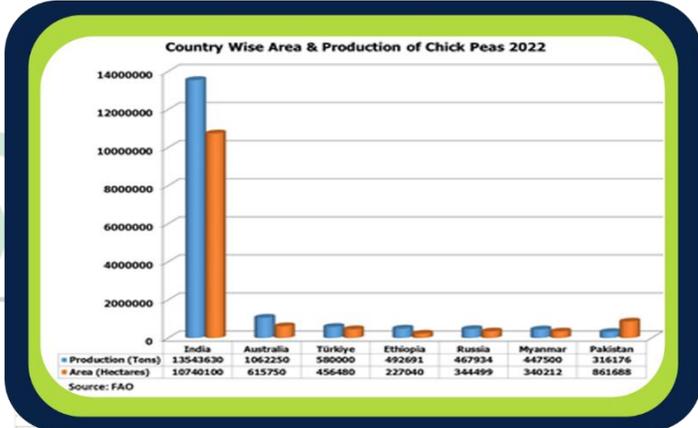


GRAM



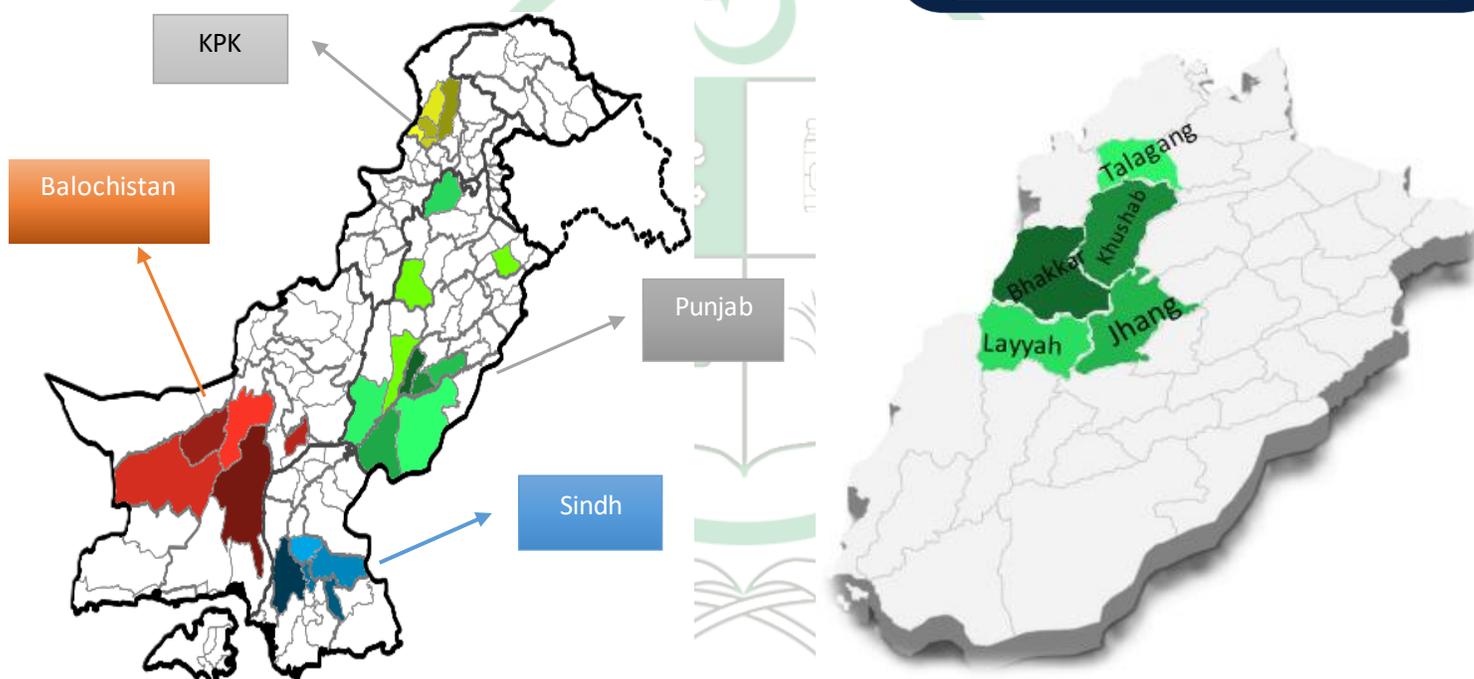
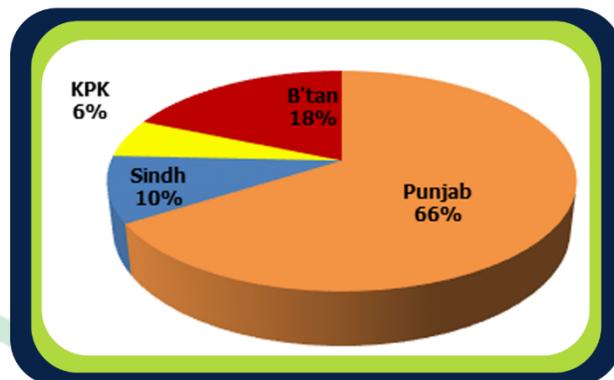
GLOBAL OVERVIEW

- Gram (chickpea) is produced globally, with India emerging as the leading producer.
- According to the FAO, India produced 13.54 million tons of gram from an area of 10.7 million hectares in 2022.
- Following India, other major producers of gram include Australia, Türkiye, Ethiopia, Russia, Myanmar, and Pakistan, among others.
- Pakistan is the 7th largest producer of gram, with a production of 316,176 tons cultivated over an area of 861,688 hectares.
- Among the major exporters of gram, Australia ranks first, followed by India, Canada, Russia, Türkiye, Tanzania, and Mexico, among others.
- In 2022, Australia exported 605,933 tons of gram, valued at USD 357.3 million.
- On the other hand, Pakistan was the largest importer of gram in the world in 2022.
- Pakistan imported 379,547 tons of gram, valued at USD 284 million.
- Following Pakistan, other major importers of gram include Bangladesh, the UAE, Türkiye, India, Algeria, and the USA, among others.



NATIONAL OVERVIEW

- In Pakistan, gram is primarily produced in the Punjab province, which accounts for 66% of the domestic production. Balochistan, Sindh, and Khyber Pakhtunkhwa (KPK) contribute 18%, 10%, and 6%, respectively, to the overall production.



- Major producing districts of gram in all provinces are listed below:

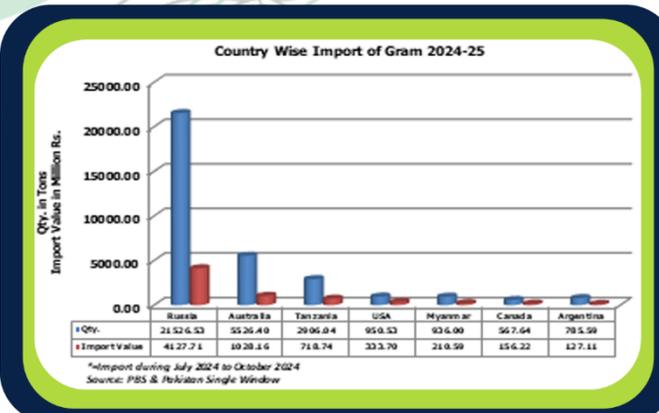
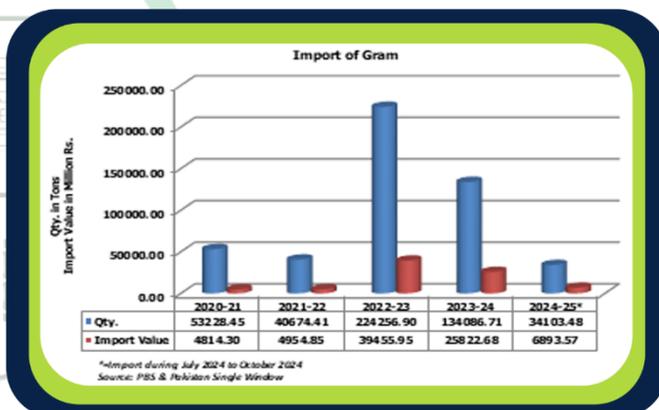
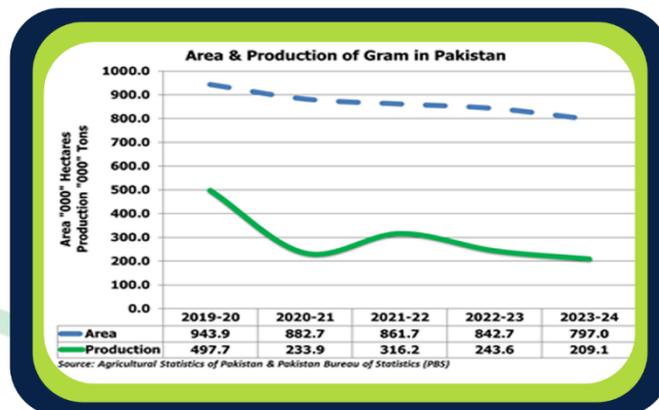
Punjab		Balochistan		Sindh		KPK	
Districts	Production (Tons)	Districts	Production (Tons)	Districts	Production (Tons)	Districts	Production (Tons)
Bhakkar	45,600	Jaffarabad	19,551	Jacobabad	9,037	D.Ikhan	5,495
Khushab	29,700	Nasirabad	14,028	Kashmore	8,968	Lakki Marwat	3,337
Jhang	24,100	Dera Bughti	848	Larkana	1,671	SD Bannu	1,413
Layyah	19,000	Panjgoor	13	Jamshoro	1,070	Tank	716
Talagang	6,200	SB Abad	63,204	Attock	41,456	Muhmand	10,326



Price Control & Commodities Management Department



- Unfortunately, the cultivated area of gram has shown a gradual decline over the past three years, leading to a less than satisfactory domestic production.
- In the year 2023-24, Pakistan's domestic gram production was recorded at 209,100 tons, cultivated over 797,000 hectares.
- This production is significantly lower than the domestic consumption requirement of 376,739 tons, necessitating reliance on gram imports to meet the country's consumption needs.
- Local crop of Gram in Punjab is cultivated during November and harvested during March-April.
- Due to insufficient domestic production, Pakistan must import gram from other countries to meet its domestic needs.
- In the year 2023-24, Pakistan imported 134,087 tons of gram, costing Rs. 25,823 million.
- In the current year (July to October), 34,103 tons of gram have already been imported.
- Pakistan imports gram from countries such as Russia, Australia, Tanzania, the USA, Myanmar, Canada, and Argentina.
- The majority of imported gram comes from Russia and Australia.
- In the current year 2024-25 (July to October), Pakistan has imported 21,527 tons of gram from Russia and 5,526 tons from Australia.



- According to the production season of gram in major producing countries, the harvesting season in Pakistan and India (March to April) coincides with the sowing season in major exporting countries such as Australia and Canada. These exporting countries plan their domestic production based on the anticipated gram production in Asian countries.



PRODUCTION SEASON OF GRAM IN MAJOR

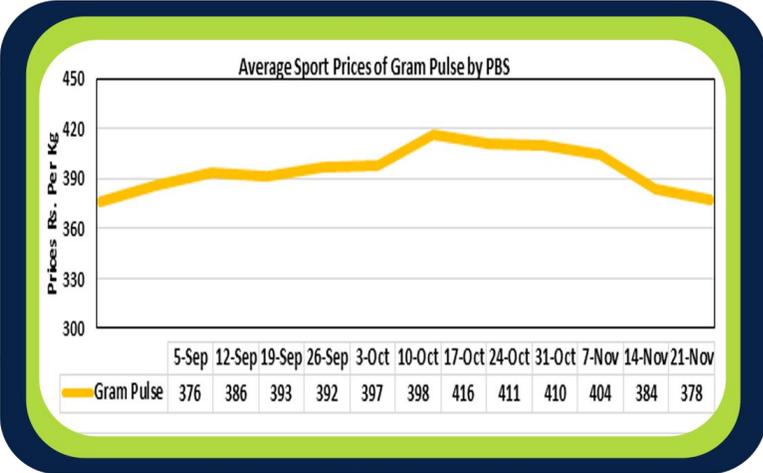
Country	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Pakistan			Dark Purple	Dark Purple						Green	Green	
Australia	Dark Purple				Green	Green	Green			Dark Purple	Dark Purple	Dark Purple
Canada				Green	Green			Dark Purple	Dark Purple			
India Rabi				Dark Purple	Dark Purple					Green	Green	Green
India Kharif						Green	Green			Dark Purple	Dark Purple	Dark Purple

Sowing ← → Time Harvesting Time → ← Sources: <https://www.pulseaus.com.au>, <https://www.mpbmsma.org>

- The production season of gram in Australia has begun, leading to an increase in the supply of gram in the international market. As a result, international prices have sharply declined from USD 930 per ton to USD 710 per ton over the past three months.



- As a result of the decline in international prices, the local price of gram has also started to decrease in the domestic market, which is depicted from following graph:





Price Control & Commodities Management Department



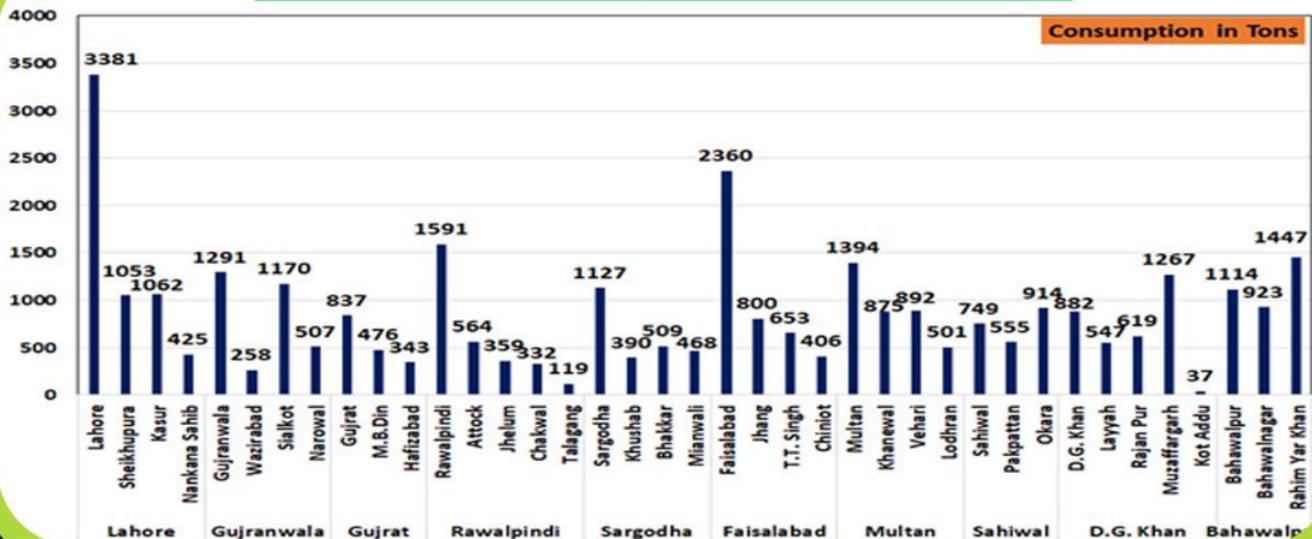
RAMADAN-2025 REQUIREMENTS

- Gram also being source of production of basin has high demand in making numerous varieties of cooking especially for Iftar dishes during Ramadan. The consumption needs of Ramdan-2025 will be met through available stocks as well as running import from other countries. The consumption of gram during Ramadan is estimated to be 33,199 tons which is likely to be double as compared to normal month.

Annual Provincial Consumption Requirement (Tons)	Monthly Provincial Consumption Requirement (Tons)	Ramzan-2025 Provincial Consumption Requirement (Tons)
1,99,195	16,600	33,199

- District wise consumption requirement of gram during Ramadan-2025 is calculated a sunder:

District Wise Ramzan Requirement of Gram in Punjab



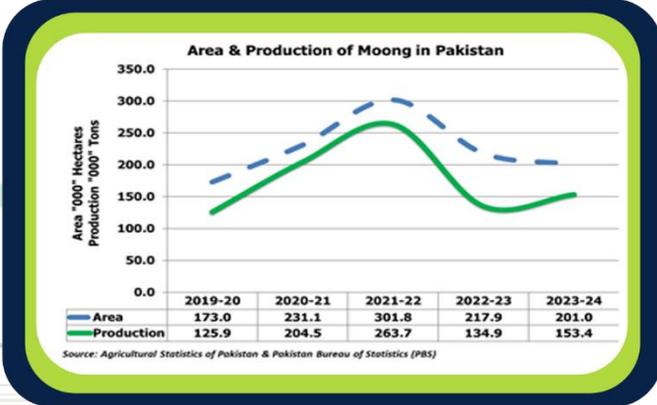
GRAM OUTLOOK

<p>Assessment</p> 	<ul style="list-style-type: none"> • This year, local production of gram has been recorded at 138,000 tons, which is 20% lower than the previous year. • International prices were initially high due to bulk buying by India, which purchased 1.1 million tons. • However, with the commencement of the production season in Australia, international prices have decreased from USD 930 per ton to USD 710 per ton. • As a result, local prices have also started to decline. • The local crop is expected to be available in April 2025, after Ramadan 2025. • In the year 2024-25 (July to October), 34,103 tons of gram have been imported from countries such as Australia and Russia. • According to market reports, the import of 1,14,200 tons is expected, with arrivals scheduled between November 15, 2024, and January 2025. • The expected consumption requirement of gram is likely to be 33,199 tons during month of Ramadan-2025 being double than normal month's demand.
<p>Forecast</p> 	<ul style="list-style-type: none"> • As international prices have significantly declined, local prices of gram are expected to decrease further in the coming days. • The consumption requirement during Ramadan-2025 will be met through available stocks and import of gram from other countries. • However, during Ramadan, the consumption of gram is expected to be twice, which may lead to slight increase in the price of gram and gram products.
<p>Advisory</p> 	<ul style="list-style-type: none"> • Due to the decline in international prices, importers should take advantage of this opportunity by placing maximum import orders. • DCs Faisalabad and Sargodha should coordinate to ensure maximum future contracts with Australian suppliers through importers, guaranteeing a steady supply during Ramadan 2025. • DCs should keep updating stock position report of gram on regular basis and make well in arrangements for ensuring their requisite supply of gram during Ramadan-2025. • Additionally, as the local sowing season is underway, the Agriculture Department (Extension Wing) should encourage farmers to increase the area under gram cultivation.

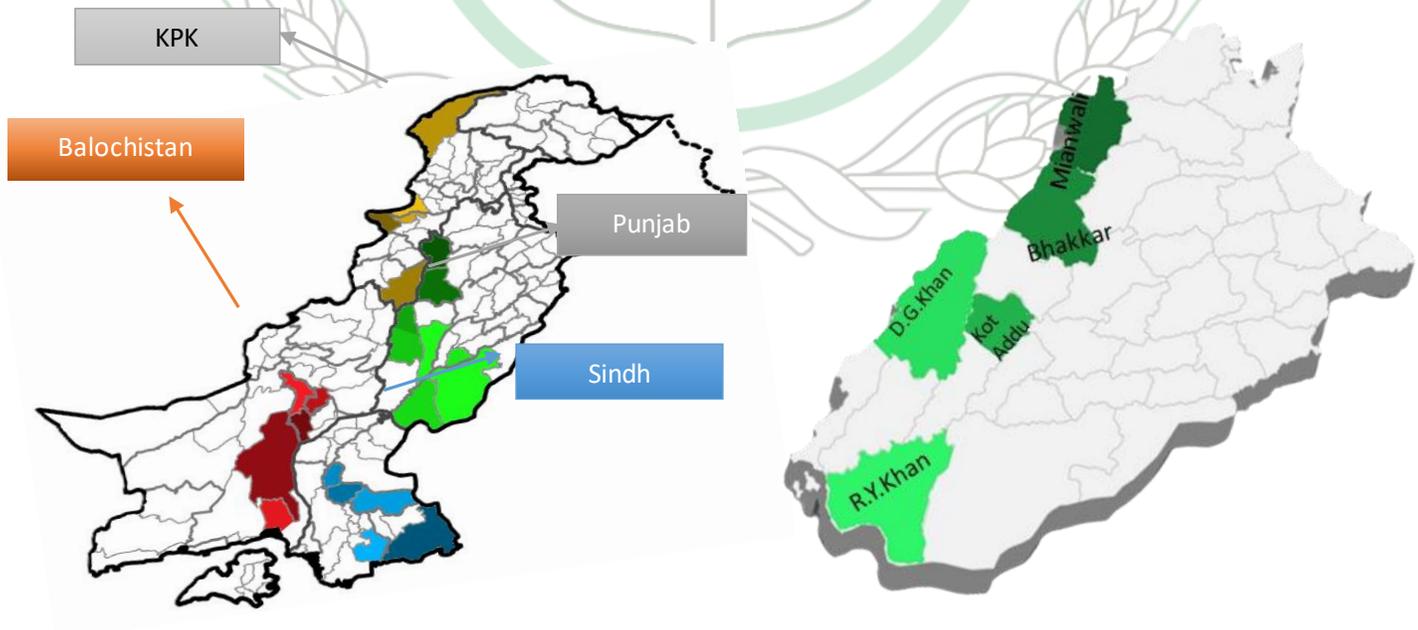
MOONG



- The domestic production of moong is depicting declining trend over the last 2 years.
- During year 2021-22, domestic production of moong was recorded at 2,63,700 tons on an area of 3,01,800 hectares, both production and area have been reduced to 1,53,400 tons and 2,01,000 hectares, respectively.



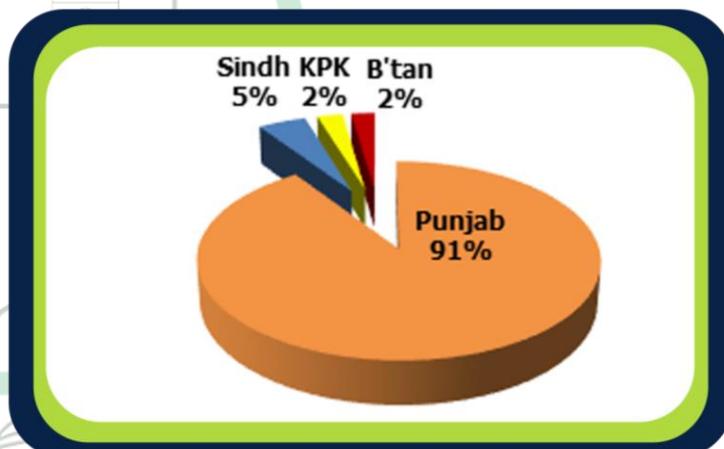
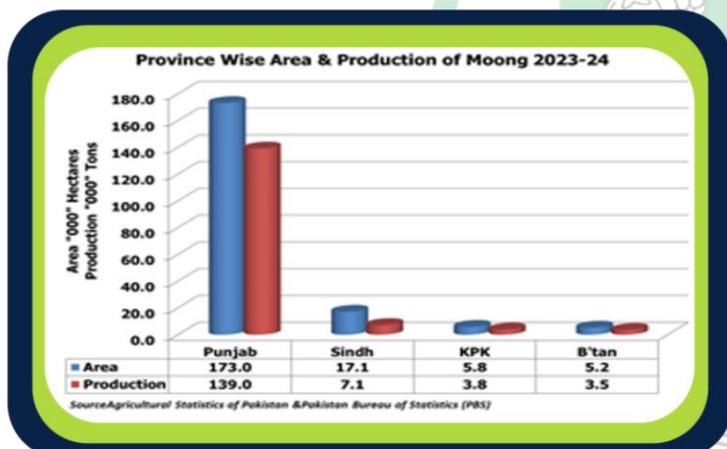
- For geographical indication, major production areas of Moong have been highlighted on the maps of Pakistan and Punjab province.



- Major Producing districts of Moong in all provinces are listed below:

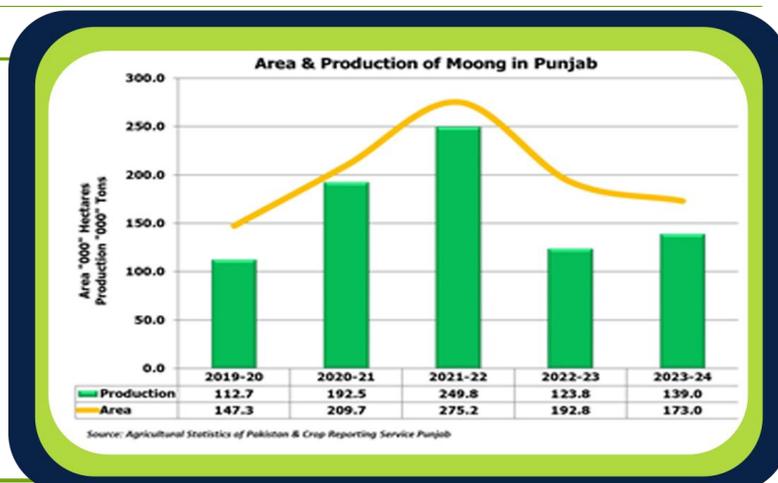
Punjab		Balochistan		Sindh		KPK	
Districts	Production (Tons)	Districts	Production (Tons)	Districts	Production (Tons)	Districts	Production (Tons)
Attock	217	Nasirabad	1,151	Shahdat Kot	165	Bajour	951
Rawalpindi	112	Panjgoor	29	Matiari	139	Tank	647
Jhelum	99			Jamshoro	63	Chitral	336
Gujrat	36			Khairpur	47	Lakki Marwat	62
Narowal	36			Kashmore	24	Swat	46

- Punjab has highest share (91%) in the domestic production, whereas Sindh, Balochistan and KPK have their share as 5%, 2% and 2%, respectively.

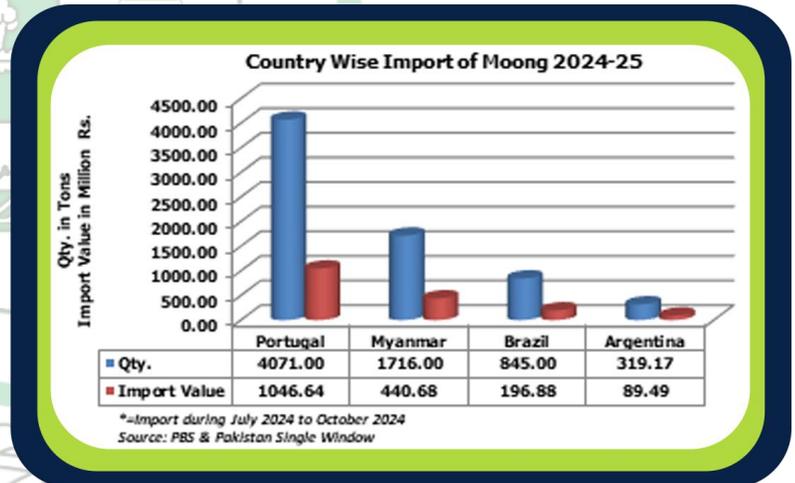
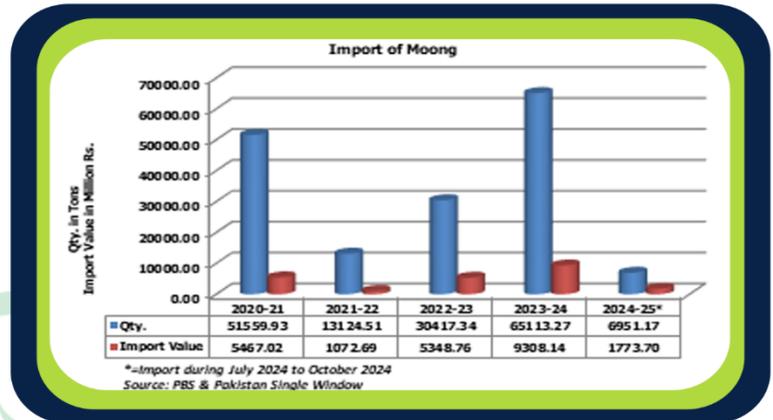


- During year 2023-24, Punjab produced 1,39,000 tons of moong, followed by Sindh with 7100 tons, KPK with 3800 tons and Balochistan with 3500 tons.

- Production of moong in Punjab is exhibiting declining trend for last 2 years. During year-2021-22, Punjab produced 2,49,800 tons of moong on area of 2,75,200 hectares, unfortunately both production and area have declined to 1,39,000 tons and 1,73,000 hectares, respectively.



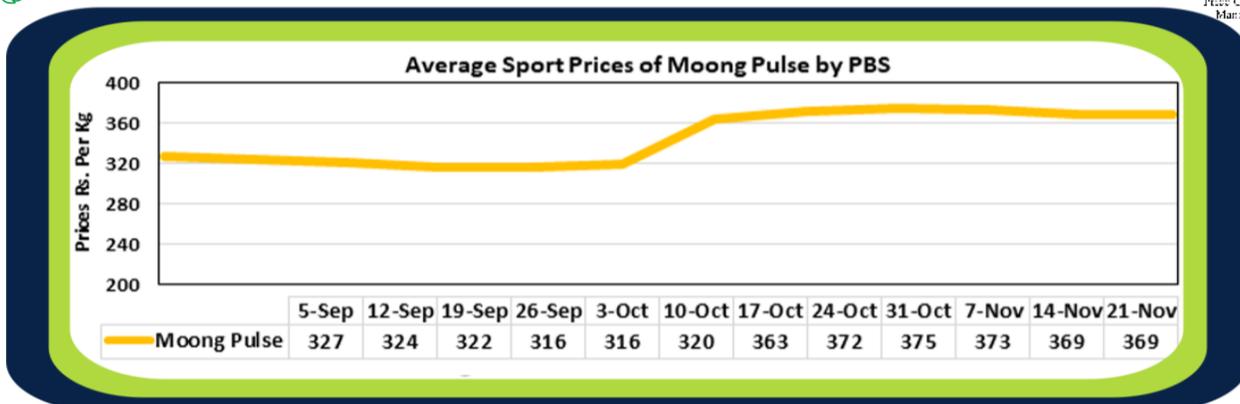
- Annual domestic production of moong is 1,53,400 tons, which is far less as compared to annual domestic consumption requirement i.e. 2,02,860 tons. Therefore, import of moong is required to bridge the gap between demand and supply in the local markets.
- During year 2023-24, Pakistan imported 65,113 tons of moong at the cost of Rs.9308 million. During current year 2024-25 (July to October), 6,951 tons of moong has been imported.
- Pakistan mostly imports moong from Portugal, Myanmar, Brazil & Argentina etc.
- During year 2024-25 (July to October), 4071 tons from Portugal and 1716 tons from Myanmar has been imported to meet domestic consumption requirement.



- Production season of moong in Punjab commences during August – September.
- This year production of Moong in Punjab has been affected as a result of torrential rainfalls due to which supply remained under stress, moreover local production season has also reached to an end, therefore average retail price of moong in Punjab is on higher side.
- The Prices of other pulses i.e. Gram, Mash and Masoor are declining, therefore price of moong is also expected to show declining trend as a result of substitute effect.



Price Control & Commodities Management Department

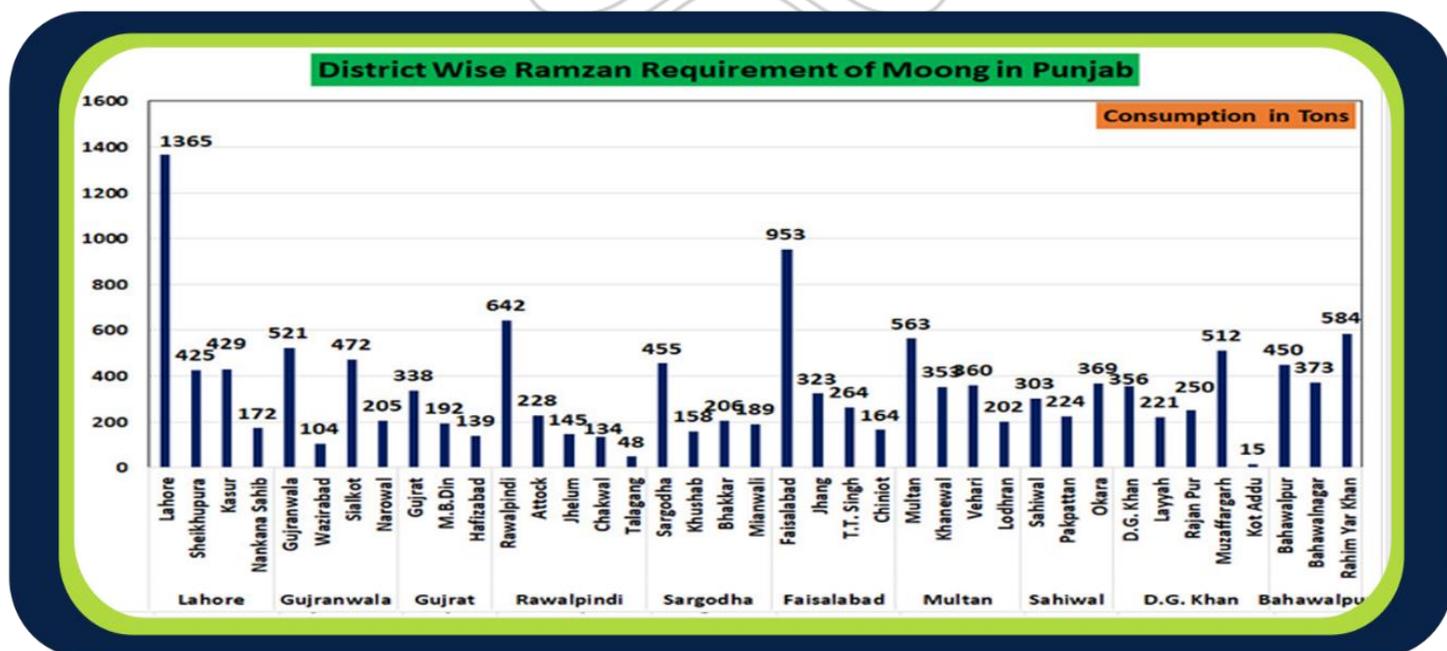


RAMADAN-2025 REQUIREMENTS

- The consumption pattern of Moong appears to be increased by 1.5 times during month of Ramadan in contrast with requirement of an ordinary month. The requirement of Moong during Ramadan-2025 is expected to be 13,407 tons which is calculated as under:

Annual Provincial Consumption Requirement (Tons)	Monthly Provincial Consumption Requirement (Tons)	Ramzan-2025 Provincial Consumption Requirement (Tons)
1,07,259	8,938	13,407

- District wise consumption requirement of moong during month of Ramadan is ascertained as under:





MOONG OUTLOOK

Assessment



- This year local production of Moong has been recorded at 1,15,630 tons which is 17% less over the last year.
- This decline in production has appeared due to damage in crop by rainfalls.
- During year 2024-25 (July-October), 6951 tons has been imported from Portugal, Myanmar, Brazil and Argentina, etc.
- Supply in pipe line is 12,000 tons which will arrive during November to December.
- Decreasing trend has been observed in the prices of imported pulses like Mash, Masoor and Gram, therefore it is expected that during Ramadan-2025 its supply & price will likely to be in normal range.
- During Ramadan-2025, requirement of Moong will likely to be 13,407 tons.

Forecast



- Prices of other pulses are experiencing decreasing trend which may cause decline in prices of Moong in coming days as a result of substitute effect.
- During Ramadan-2025, prices are anticipated to remain in normal range due to availability of sufficient local supply along with import from other countries.

Advisory



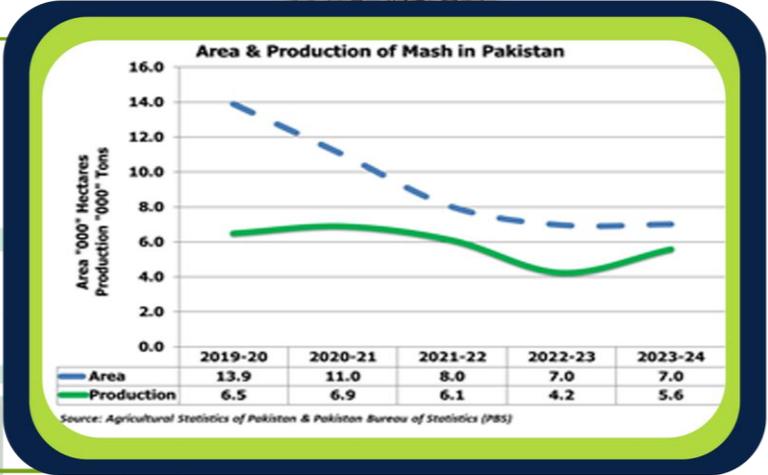
- Main producing districts of Moong are Mianwali, Bhakhar, Kot Addu & DG Khan therefore EADAs (E&M) and Secretaries MC may arrange maximum supply from these districts through local commission agents to meet the requirement of Ramadan-2025.
- District Administration should watchfully observe the stock situation and make all out efforts to ensure their requisite supply of Moong in markets during Ramadan-2025.



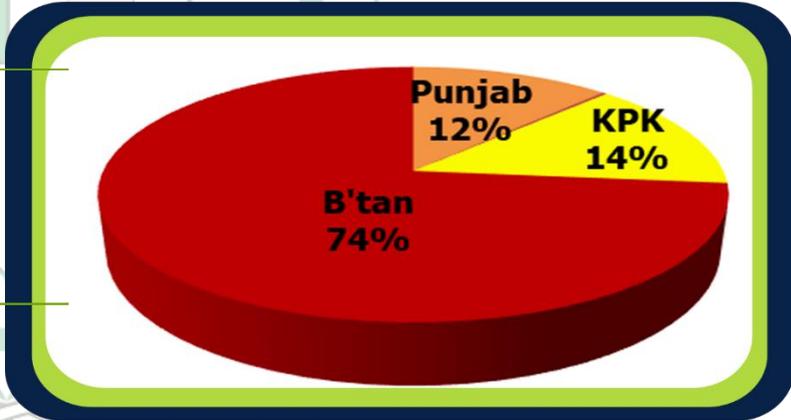
MASH



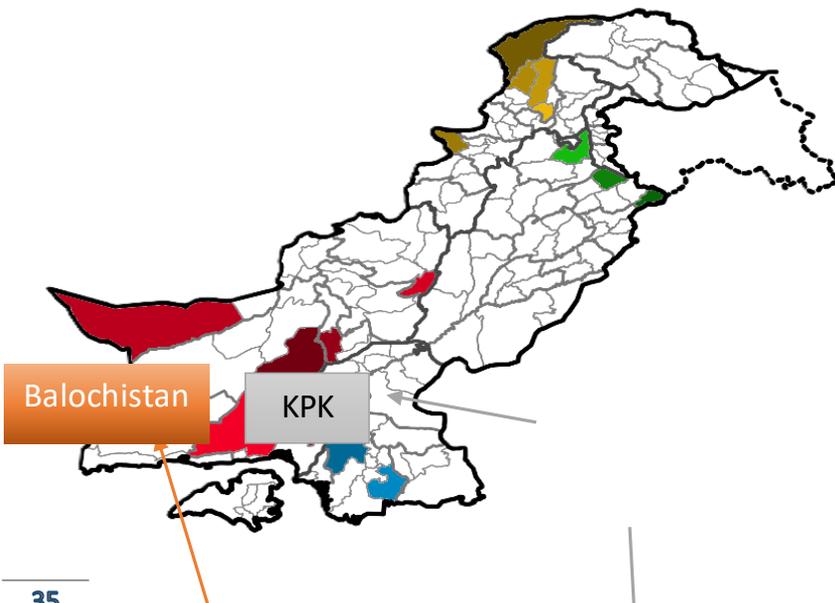
- Domestic production of Mash is quite negligible, therefore 97% of consumption requirement are fulfilled through import from other countries.
- Cultivated area and domestic production of Mash have been declining since 2019-20 with slight fluctuation. Balochistan has major share (74%) in domestic production, followed by KPK and Punjab with their respective shares of 14% and 12%.



- During year 2023-24, Pakistan has produced 5600 tons of Mash on an area of 7000 hectares, production of Mash has slightly increased, whereas area remained stable over the last year.



- For geographical indication, major production areas of Mash have been highlighted on the maps of Pakistan and Punjab province.





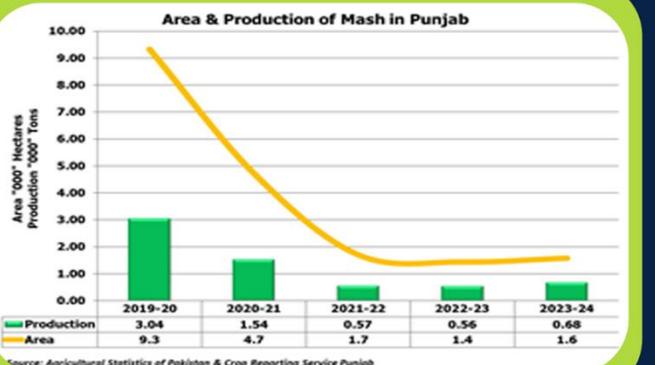
Price Control & Commodities Management Department



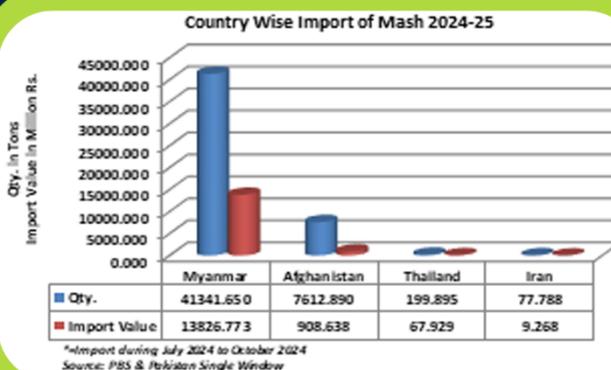
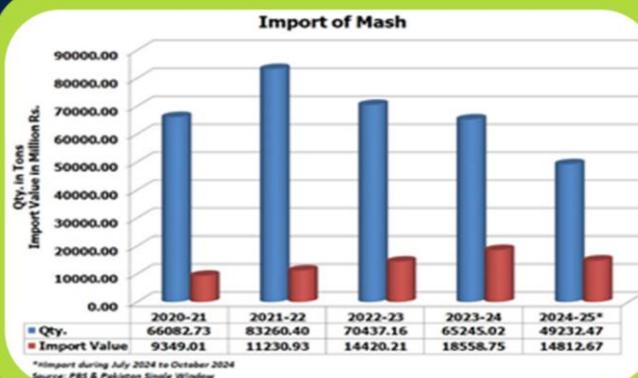
- Major Producing districts of Mash in all provinces are listed below:

Balochistan		Punjab		KPK		Sindh	
Districts	Production (Tons)	Districts	Production (Tons)	Districts	Production (Tons)	Districts	Production (Tons)
Khuzdar	1,600	Narowal	542	Chitral	517	Jamshoro	21
Jhal Magsi	815	Gujrat	136	Kurram	105	Badin	1
Chagai	519	Rawalpindi	4	Dir Upper	80		
Barkhan	358	Narowal	542	Swat	60		
Awaran	228	Gujrat	136	Bunir	42		

- Area and Production of Mash in Punjab could not grow on higher pace, which resulted in deficit production of province. During year 2023-24, Punjab has produced 680 tons of Mash on an area of 1600 hectares, both area and production have slightly increased over the last year.



- Annual total domestic production of Mash is 5600 tons, whereas annual domestic consumption requirement is 1,44,900 tons, due to which 97% of domestic consumption requirement is met through import from other countries.
- As a result of low domestic production, Pakistan has imported 65,245 tons during year 2023-24 in exchange of Rs.18,559 million. However, during current year 2024-25 (July to October), 49,232 tons of Mash has been imported so far, at the cost Rs.14,813 million.
- Pakistan mainly imports Mash from Myanmar, Afghanistan, Thailand and Iran, etc. Quantum of import of Mash from Myanmar, Afghanistan is significantly high as compared to other countries.

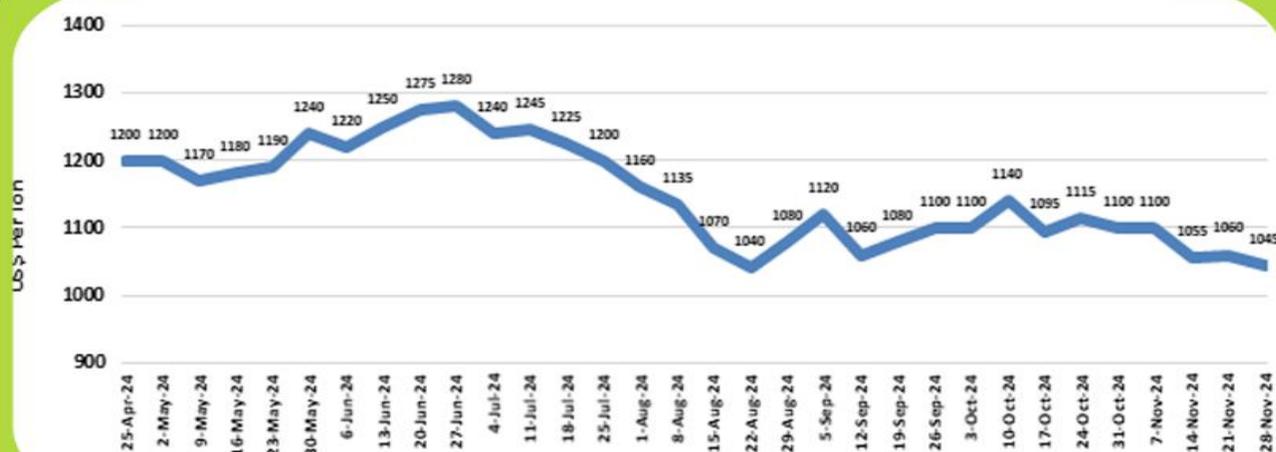




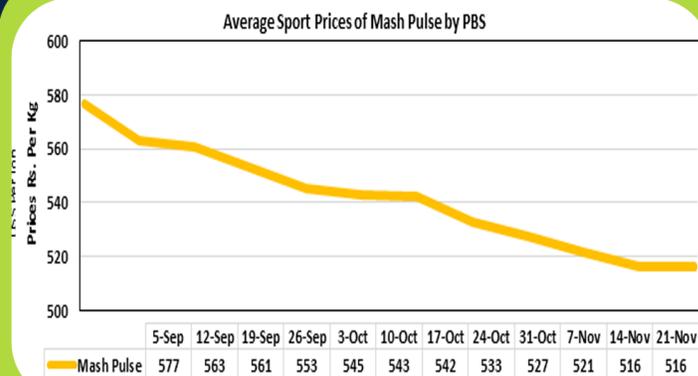
Price Control & Commodities Management Department



- During current year (July to October), Pakistan has imported 41,342 tons of Mash from Myanmar and 7,613 tons from Afghanistan.
- Myanmar is the major producing country of Mash. As per Myanmar Pulses, Beans, Maize, and Sesame Seeds Merchants Association (MPBMSMA), sowing season of Mash in Myanmar commences during November and harvesting season starts in March-April.
- This year India purchased bulk quantum of pulses from international market due to its less domestic production, however production season of Mash has been begun in India, accordingly India has stopped buying from international market, subsequently stress in international market has been reduced and international prices have started to show declining trend.
- International prices of Mash have declined from USD 1280/ton to USD 1045/ton over last 5 months. Declining trend in international prices of Mash is clearly evident from following graph:



- On account of decline in international prices, decline in local price of Mash is also being witnessed in local markets. A graphical trend of average retail price of Mash in Punjab is given as under:



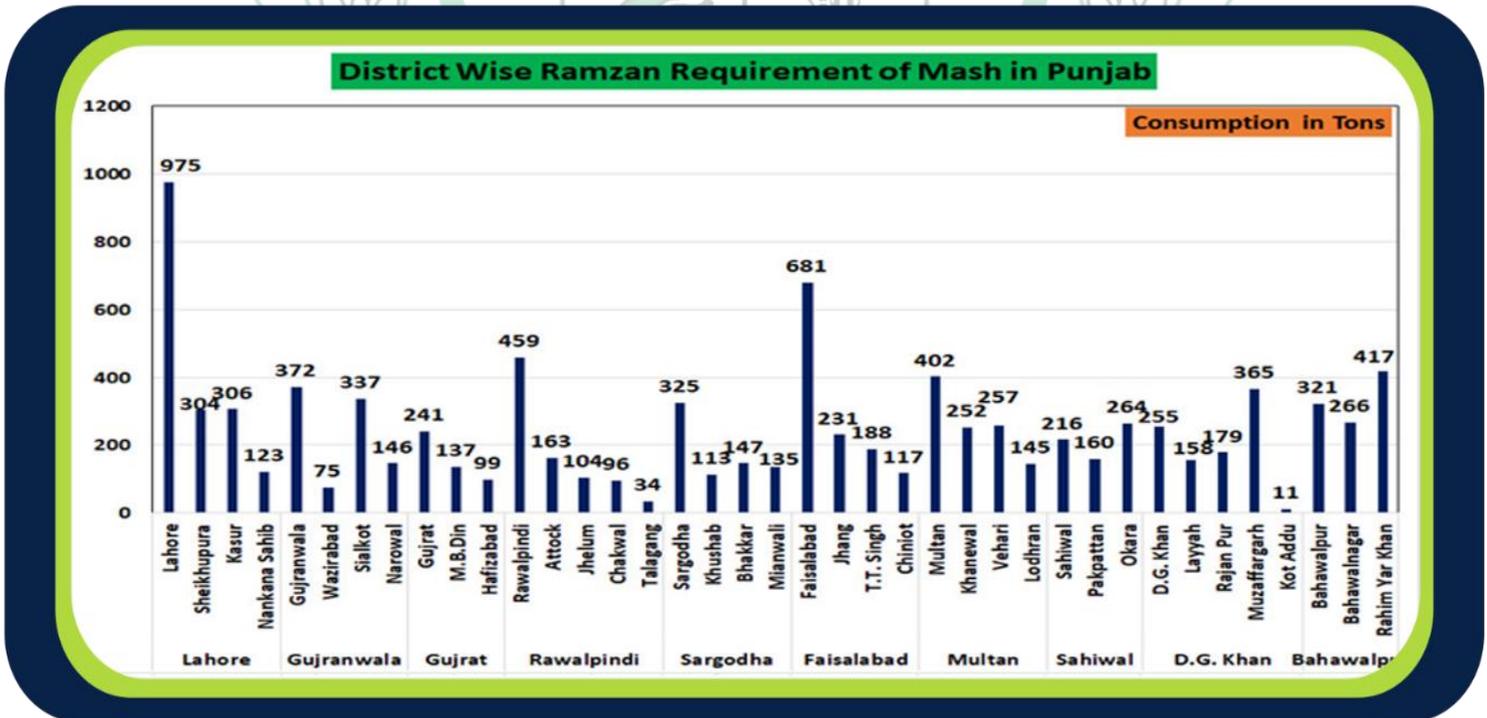


RAMADAN-2025 REQUIREMENTS

- As an estimate during month of Ramadan, consumption need of Mash is increased by 1.5 times in a comparison with an ordinary month. The provincial consumption requirement of Mash during Ramadan-2025 is expected to be 9,577 tons which is calculated as under:

Annual Provincial Consumption Requirement (Tons)	Monthly Provincial Consumption Requirement (Tons)	Ramzan-2025 Provincial Consumption Requirement (Tons)
76,613	6,384	9,577

- District wise consumption requirement of Mash for month of Ramadan-2025 is calculated as under:





MASH OUTLOOK

Assessment



- Pakistan is entirely dependent on import to fulfil domestic consumption requirement.
- About 97% consumption requirement is met through import.
- International prices of Mash were on higher side due to buying by India, however India has now stopped buying Mash from international market due to start of production season.
- Resultantly, international price has declined from US\$ 1280 /ton to US\$ 1045/ton.
- During Year 2024-25 (July-October), 49,232 tons of Mash has been imported from Myanmar & Afghanistan etc.
- As per market report, import of 8100 tons is in pipe line which will arrive during November to January.
- Decline in local prices is also being observed.
- As an estimate, consumption requirement of Mash during Ramadan-2025 will be 9,577 tons.

Forecast



- On account of considerable decrease in international prices, local price of Mash has declined and is likely to further decline in coming days.
- In order to meet the requirement during Ramadan-2025, sufficient stocks and smooth import of Mash are imperatively required.

Advisory

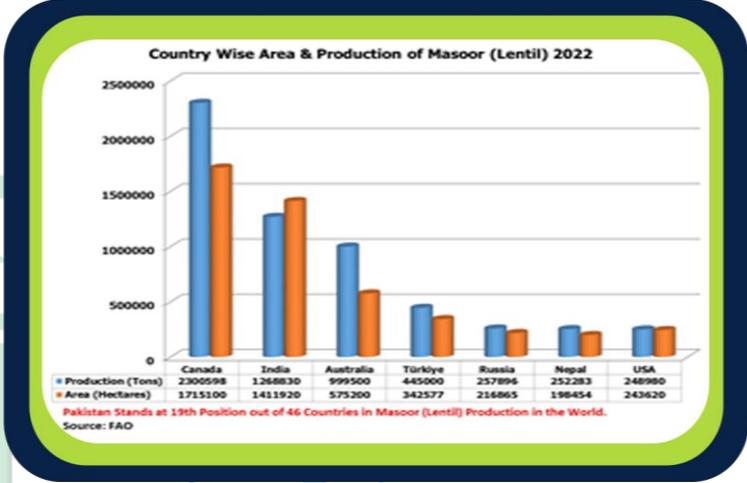


- To utilize the opportunity of reduced international price, importers may be encouraged to undertake maximum import order especially with reference of coming Ramadan, 2025.
- EADAs (E&M) and Secretaries Market Committee of Faisalabad & Sargodha districts should play pivotal role to ensure maximum import from Myanmar for smooth supply of Mash in local markets.
- All EADAs (E&M) and Secretaries MC should keep close liaison with traders/importers of pulses to arrange maximum stocks as per consumption requirement during Ramadan-2025.
- District Administration should remain vigilant about available stocks and take all possible measures to arrange maximum stocks of Mash as per requirement of their districts keeping in view the forthcoming month of Ramadan-2025.

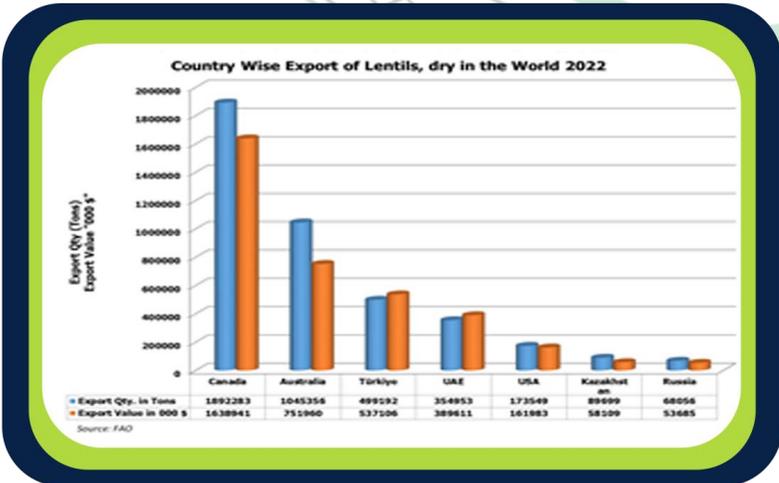


MASOOR

- Globally, Masoor/Lentil is grown in Canada, India, Australia, Türkiye, Russia, Nepal and USA, etc.
- Canada comes atop major producing countries of Masoor, with production of 2.3 million tons on an area of 17,15,100 hectares during year 2022.
- India is 2nd largest producer of Masoor in the world having production 1.26 million tons on an area of 14,11,920 hectares.



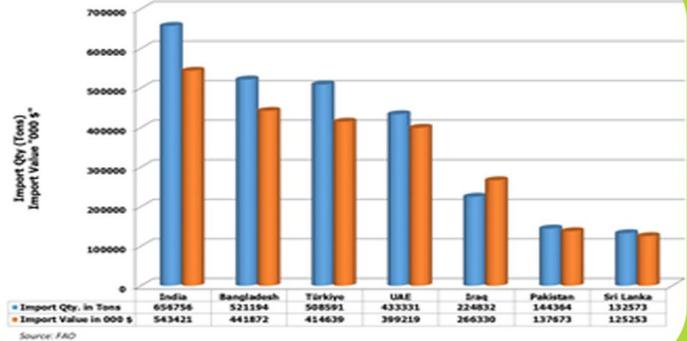
- Pakistan stands at 19th position in the world with reference to production of Masoor.
- Canada being largest producer is also a leading exporting country of Masoor in the world.
- Canada stood at 1st rank with reference to export of Masoor across the world. During year 2022, Canada exported 1.89 million tons which was of worth USD 1638 million.
- Australia came up at 2nd rank with export of 1.045 million tons having worth of USD 751 million.





- In row of importing countries, India, Bangladesh, Turkey, UAE, Iraq, Pakistan and Sri Lanka, etc are prominent ones.
- India is a biggest importer of Masoor with import volume of 6,56,756 tons and Pakistan stood at 6th rank with import of 1,44,364 tons during year 2022.

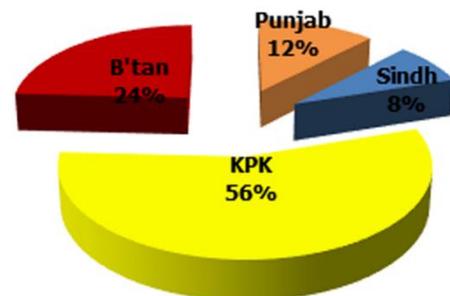
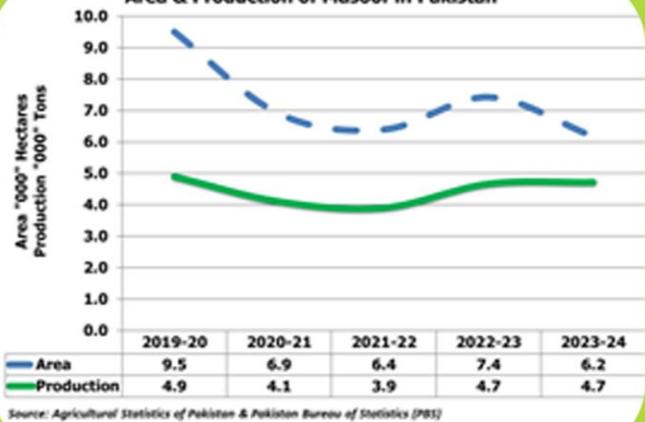
Country Wise Import of Lentils, dry in the World 2022

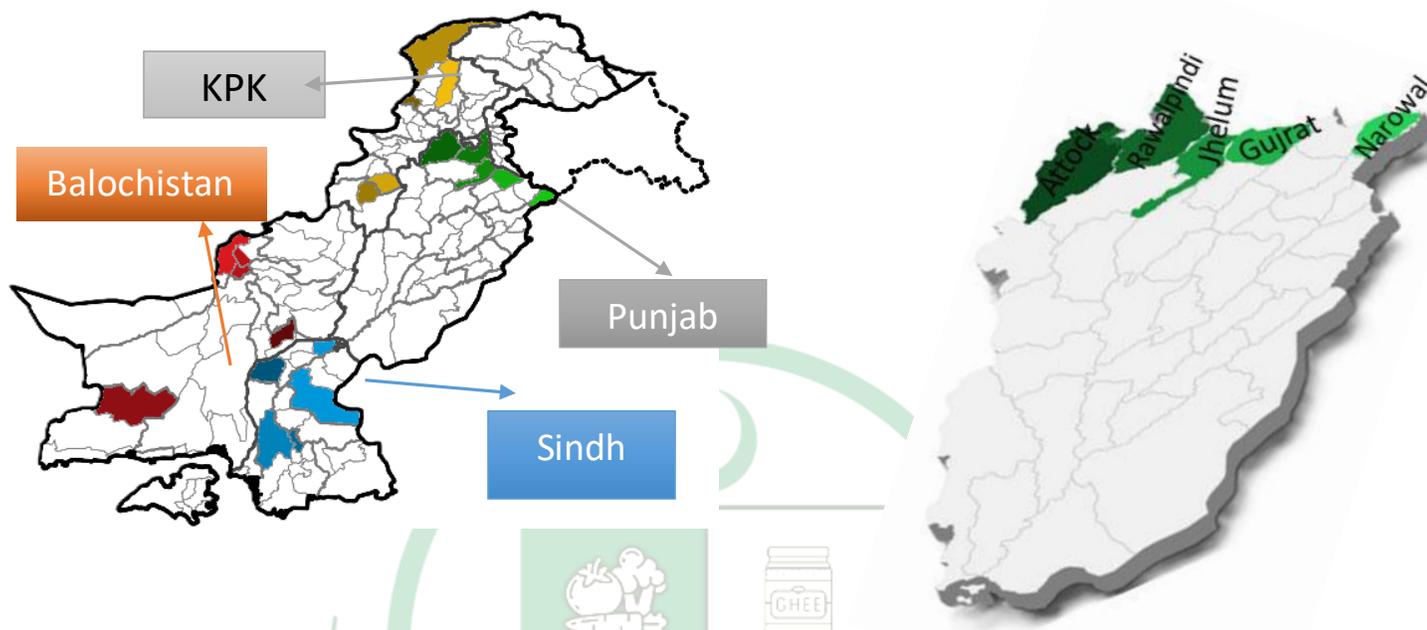


NATIONAL OVERVIEW

- Domestic production of Masoor is minute, therefore 92% of consumption requirement are fulfilled through import from other countries.
- During year 2023-24, Pakistan has produced 4700 tons of Masoor on an area of 6200 hectares, production of Masoor is stable, whereas area slightly decreased over the last year.
- KPK has major share (56%) in domestic production, followed by Balochistan, Punjab and Sindh with their respective shares of 24%, 12% and 8%.
- For geographical indication, major production areas of Masoor have been highlighted on the maps of Pakistan and Punjab province.

Area & Production of Masoor in Pakistan



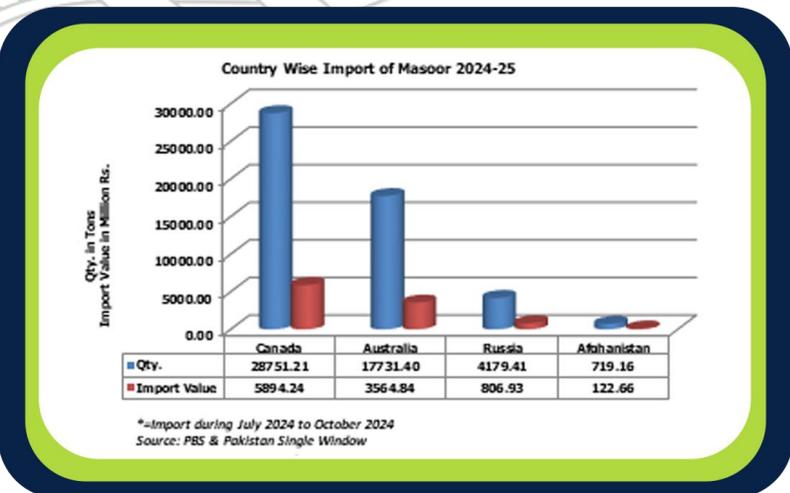
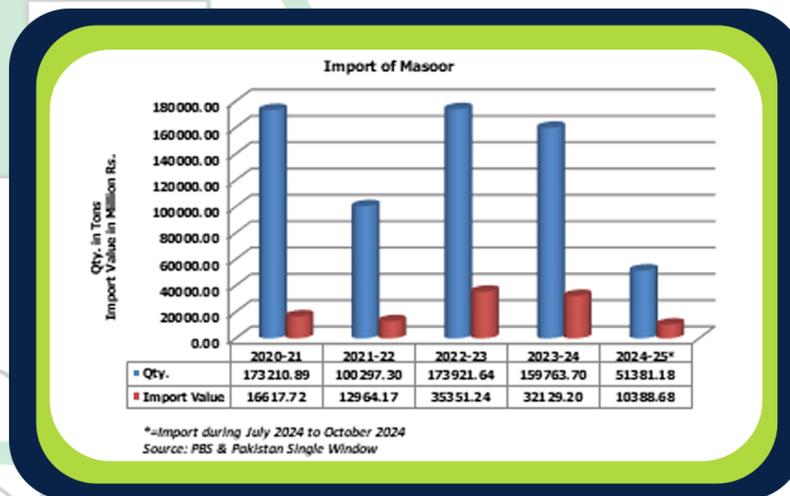
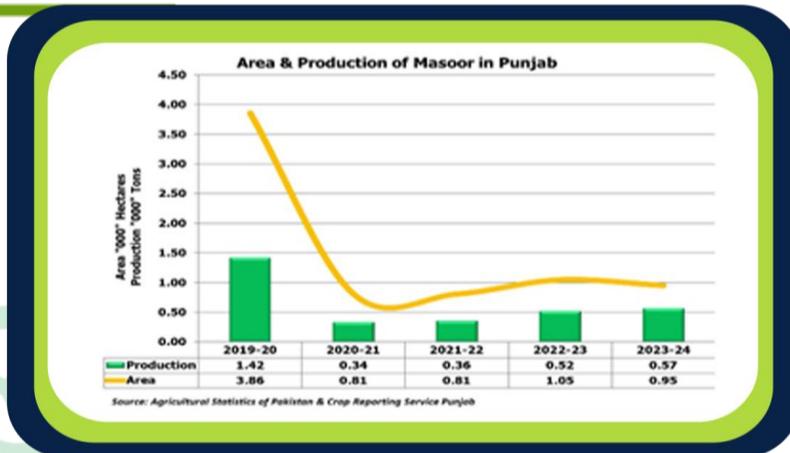


- Major Producing districts of Masoor in all provinces are listed below:

KPK		Balochistan		Punjab		Sindh	
Districts	Production (Tons)	Districts	Production (Tons)	Districts	Production (Tons)	Districts	Production (Tons)
Bajour	951	Nasirabad	1,151	Attock	217	Shahdat Kot	165
Tank	647	Panjgoor	29	Rawalpindi	112	Matiari	139
Chitral	336			Jhelum	99	Jamshoro	63
Lakki Marwat	62			Gujrat	36	Khairpur	47
Swat	46			Narowal	36	Kashmore	24



- Area and Production of Masoor in Punjab could not be significantly increased during last 4 years, which resulted in deficit production of province. During year 2023-24, Punjab has produced 570 tons of Masoor on an area of 950 hectares, production have slightly increased and area has decreased over the last year.
- Annual total domestic production of Mash is 4700 tons, whereas annual domestic consumption requirement is 1,73,880 tons, due to which 92% of domestic consumption requirement is met through import from other countries.
- As a result of low domestic production, Pakistan has imported 1,59,763 tons during year 2023-24 in exchange of Rs.32,129 million. However, during current year 2024-25 (July to October), 51,381 tons of Masoor has been imported so far, at the cost Rs.10,389 million.
- Pakistan mainly imports Masoor from Canada, Australia, Russia and Afghanistan, etc. Quantum of import of Masoor from Canada and Australia is significantly high as compared to other countries.





- During current year (July to October), Pakistan has imported 28,751 tons of Masoor from Canada at expense of Rs.5,894 million and 17,731 tons from Australia at cost of Rs.3565 million.
- According to production season of Masoor in major producing countries, harvesting season of Masoor (March to April) in Pakistan & India coincides with sowing season of Masoor in major exporting countries i.e. Australia & Canada. These countries target their domestic production keeping in view of assessment of production of Masoor in Asian countries.

PRODUCTION SEASON OF MASOOR IN MAJOR PRODUCING COUNTRIES

Country	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Pakistan			Harvesting	Harvesting						Sowing	Sowing	
Australia	Sowing				Sowing	Sowing	Sowing			Harvesting	Harvesting	Harvesting
Canada				Sowing	Sowing			Harvesting	Harvesting			
India Rabi				Harvesting	Harvesting					Sowing	Sowing	Sowing
India Kharif						Sowing	Sowing			Harvesting	Harvesting	Harvesting

Sowing ← → Time Harvesting Time ← → Sources: <https://www.pulseaus.com.au>, <https://www.mpbmsma.org>

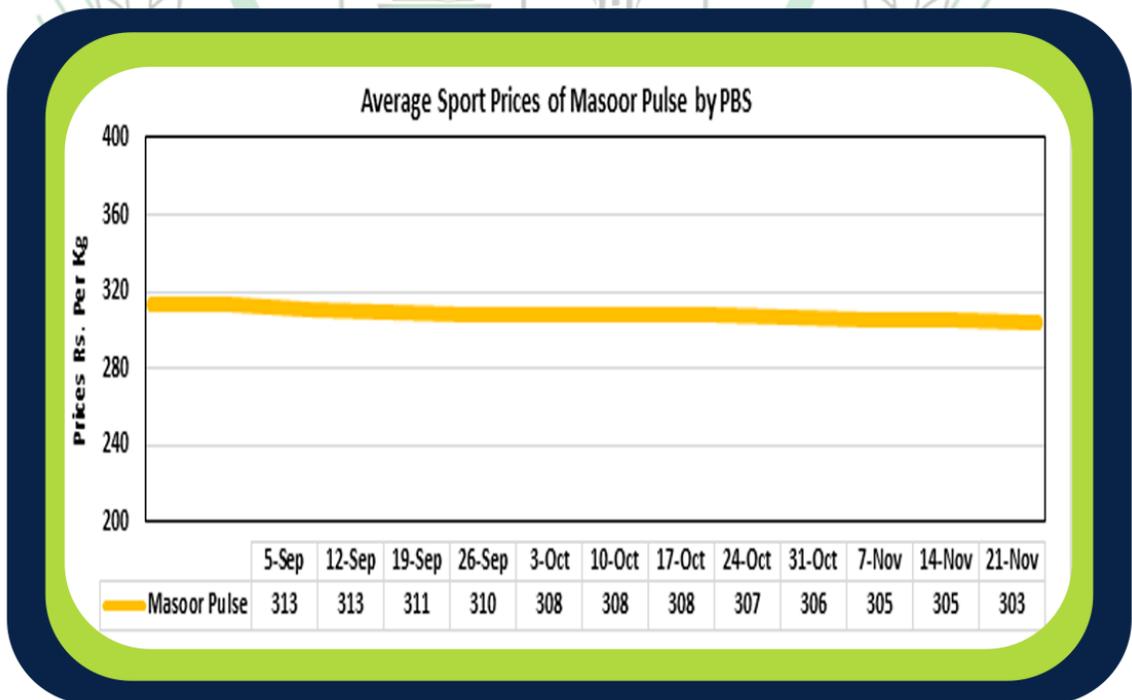
- Harvesting season of Masoor in Australia has been commenced, which resulted in improvement in supply of Masoor in international market. Accordingly international prices of Masoor have sharply declined from USD 780/ton to USD 720 USD/ton over the last 5 weeks. Decline in international prices of Masoor is evident from following graph:



Price Control & Commodities Management Department



- As a result of decline in international prices, local price of Masoor is showing almost stable trend in local market. Graphical trend of prices of Masoor pulse is given as under:





Price Control & Commodities Management Department



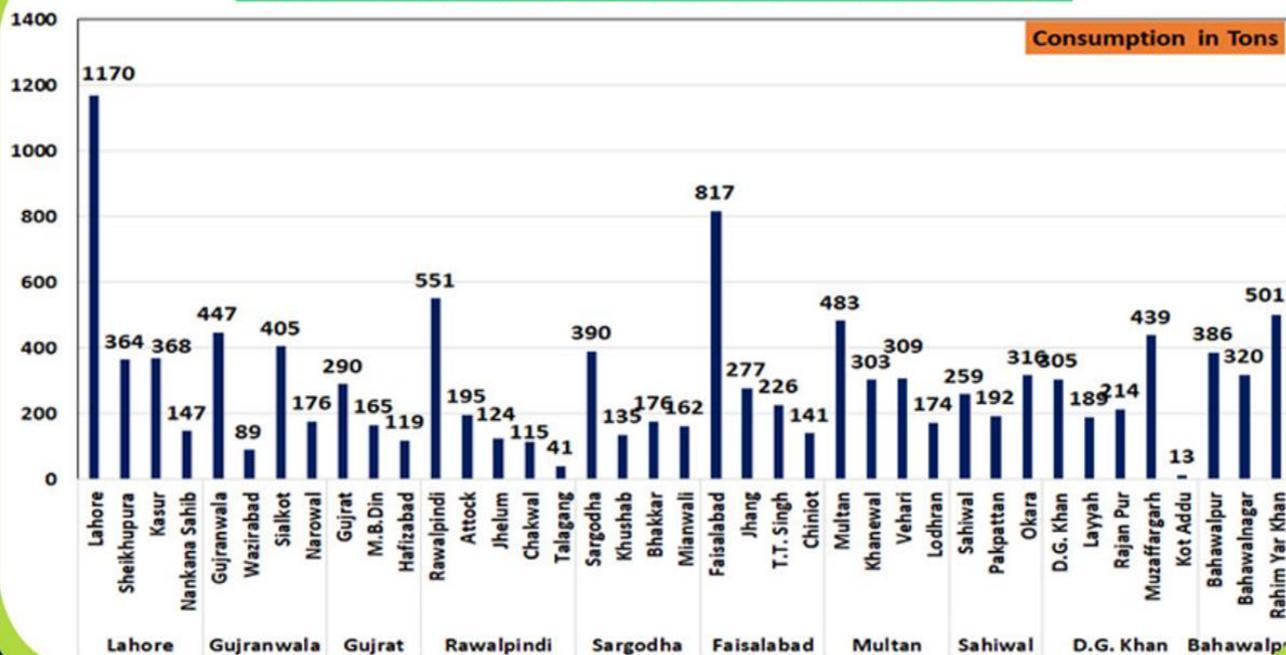
RAMADAN-2025 REQUIREMENTS

- The consumption requirement of Masoor is also likely to ascend by 1.5 times during month of Ramadan as compared to normal months. The requirement of Masoor during Ramadan-2025 is expected to be 11,492 tons which is calculated as under:

Annual Provincial Consumption Requirement (Tons)	Monthly Provincial Consumption Requirement (Tons)	Ramzan-2025 Provincial Consumption Requirement (Tons)
91,936	7,661	11,492

- District wise consumption requirement of Masoor during Ramadan-2025 is worked out as under:

District Wise Ramzan Requirement of Masoor in Punjab



<p>Assessment</p> 	<ul style="list-style-type: none"> • Due to negligible domestic production, Pakistan fulfils 92% consumption requirement of Masoor through import. • Major exporting countries of Masoor are Canada & Australia. • Production season in Australia is in progress. • Resultantly, international price has declined from US\$ 780 /ton to US\$ 720 /ton. • During Year 2024-25 (July-October), 51,381 tons of Masoor has been imported from Australia & Canada, etc. • As per market report, import of 9,250 tons is in pipe line which will arrive during November to December. • Due to decrease in international prices, local price is showing almost stable trend. • During Ramadan-2025, consumption requirement of Masoor will likely to be 11,492 tons.
<p>Forecast</p> 	<ul style="list-style-type: none"> • Subsequent to decline in international prices, local prices of Masoor are likely to remain stable. • Sufficient stocks and smooth import of Masoor will be required to meet consumption requirement during Ramadan-2025. • Supply and price situation of Masoor is anticipated to stay normal during Ramadan-2025 as a result of smooth import.
<p>Advisory</p> 	<ul style="list-style-type: none"> • EADAs (E&M) and Secretaries MC in Faisalabad & Sargodha districts should persuade local importers to arrange maximum supply from Australia in a bid to keep smooth supply on reasonable price during Ramadan-2025. • District Administration should keep vigorous monitoring of stocks ensuring requisite supply of their districts with the help of local imports/traders of pulses keeping in view requirement of Ramdan-2025. EADAs (E&M) and Secretaries MC should assist the DC concerned in this regard. • Additionally, local sowing season of Masoor is under way, Agriculture Department (Extension wing) should run a campaign to encourage farmers for considerable escalation in cultivated area and production of Masoor.