



Price Control & Commodities
Management Department

Food in Focus Market Analysis Report

November 2024





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PREFACE

The Government of Punjab has established a new department, the Price Control and Commodities Management Department, tasked with the critical role of analyzing the supply and demand dynamics of essential commodities throughout the year. This department has a diverse mandate that involves analyzing the factors leading to shortages and crop failures, implementing efficient supply chain management practices, and conducting comprehensive economic studies. The ultimate goal is to foster stability in both the supply and pricing of essential commodities, thereby, safeguarding the interests of consumers and producers alike.

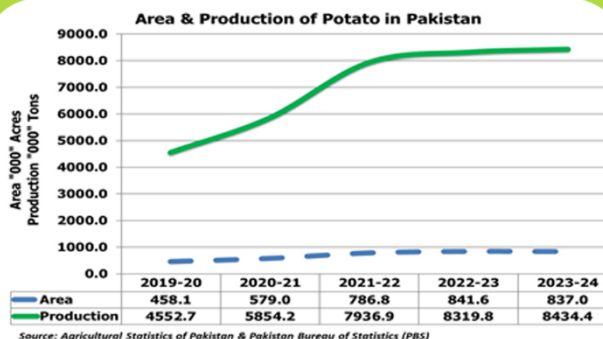
To further enhance its outreach and communication efforts, the Price Control and Commodities Management Department is set to launch a monthly market bulletin “**Food in Focus: Market Analysis Report**.” This report will serve as an invaluable resource for a diverse range of stakeholders, including researchers, academic institutions, farmers, and policymakers. It will deliver comprehensive and up-to-date information on the supply and pricing dynamics of essential commodities, enabling stakeholders to make informed decisions based on current market conditions.

The **Food in Focus** will encompass a variety of elements, such as detailed analysis 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. Furthermore, it will facilitate a deeper understanding of market fluctuations and trends, thereby, empowering stakeholders to respond proactively to changes in the economic landscape.

Summarily, the establishment of the Price Control and Commodities Management Department and the launch of the **Food in Focus** underscore the Government of Punjab's commitment to enhancing market transparency and supporting the consumers. By fostering collaboration and information sharing among all stakeholders, the department aims to create a more resilient and stable environment for essential commodities, ultimately benefiting the economy and society as a whole.

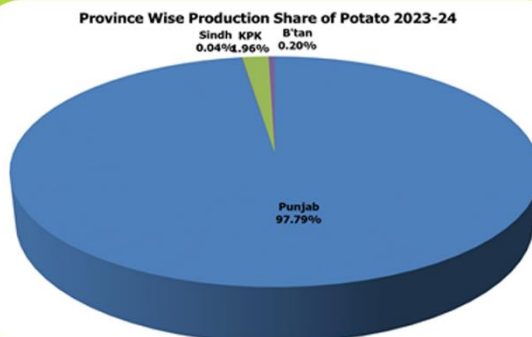
Potato

- Potato holds significant importance in Pakistan for various reasons. Economically, it is a key cash crop that contributes to the agricultural sector, providing vital income for farmers and supporting rural livelihoods. Nutritionally, it is a rich source of carbohydrates, vitamins, and minerals, making it a staple food that helps address food security. Its versatility allows for diverse culinary uses, from simple boiled dishes to snacks and complex curries, enhancing their market potential. Additionally, potato cultivation creates employment opportunities in farming, processing, and distribution, particularly in rural areas.
- With its export potential, Pakistan can enhance foreign exchange earnings through improved quality and packaging. Culturally, potato is deeply ingrained in local cuisines and traditions, making it significant to the population.



- The domestic production of potato is surplus, enabling the country to be self-sufficient in meeting its consumption needs. In the 2023-24 year, total domestic potato production has risen from 8,319,800 tons to 8,434,400 tons compared to the previous year.

- Potato is primarily cultivated and produced in the Punjab, which accounts for the largest share of total domestic production at 97.79%. In contrast, the contributions from KPK, Baluchistan, and Sindh are minimal, with shares of 1.96%, 0.20%, and 0.04%, respectively.

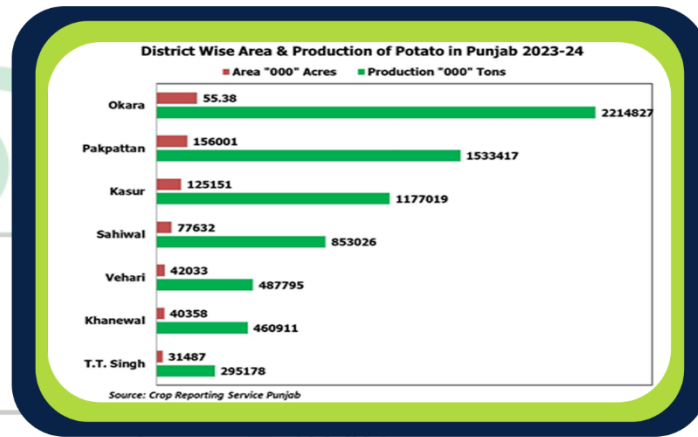
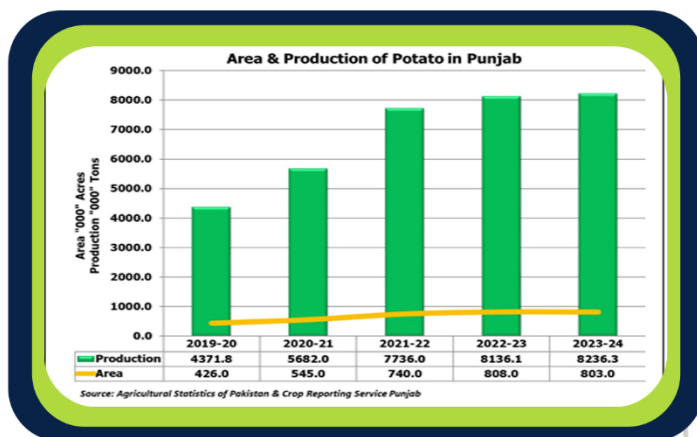




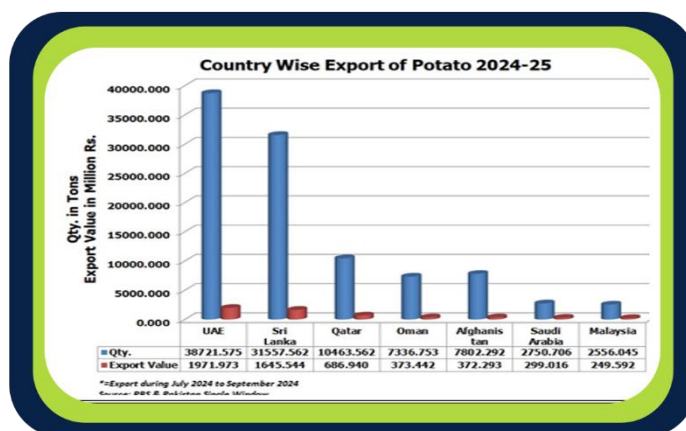
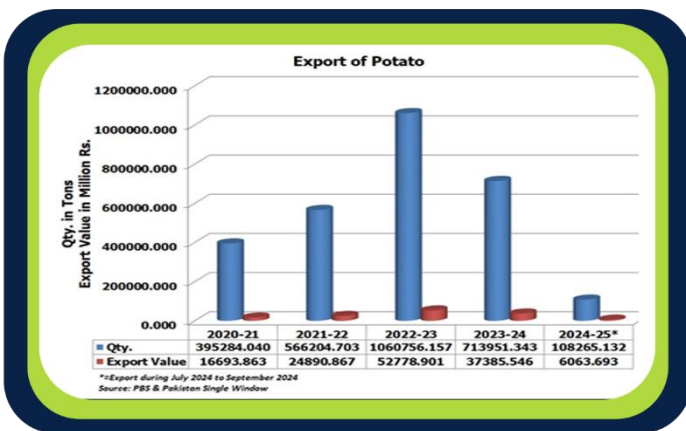
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- In the 2023-24 year, potato production in Punjab reached 8,236,260 tons, representing a 1.23% increase from last year's production of 8,136,051 tons. The major potato-producing districts in Punjab include Okara, Pakpattan, Kasur, Sahiwal, Vehari, Khanewal, and T.T. Singh.



- Due to high production volumes, potato is exported in significant quantities to countries such as the UAE, Sri Lanka, Qatar, Oman, Afghanistan, Saudi Arabia, and Malaysia, contributing to foreign exchange reserves. In the last year, 2023-24, a total of 713,951 tons of potatoes were exported, generating an export value of USD 132.152 million.

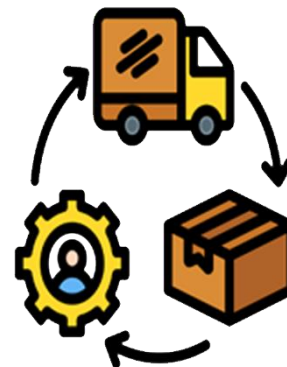




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Province	Top Production Districts	Availability of Potato Crop in Markets
Punjab	Okara, Pakpattan, Kasur, Sahiwal, Vehari, Khanewal, T.T. Singh etc.	November – June
Sindh	Khairpur, N. Feroze, Shikarpur, Dadu & Sukkur etc.	December - January
KPK	Chitral, Nowshera, Bajour, Mansehra & Kurram etc.	July – November
Balochistan	Barkhan, Killa Saifullah, Pishin, K. Abdullah & Kalat etc.	15 August - October



Assessment



- Currently, the primary supply of potatoes in Punjab is sourced from local cold storages in Okara and Sahiwal, supplemented by fresh potatoes from KPK and Baluchistan. As the potato production season in Punjab has concluded, and due to elevated cold storage costs, prices are currently 8.46% higher than last year. However, fresh potato crop from Punjab is anticipated to arrive after November 15, 2024, from the Soon Valley district, Khushab, Gujranwala, and Sialkot. Additional supplies are expected in December from Kasur, Okara, and Sahiwal. Following this, the supply and pricing of potatoes are projected to stabilize.

Forecast

- Potato prices are expected to remain high due to off-production season and the diminished availability of fresh potatoes. However, local supplies are anticipated to increase significantly in December, which will help stabilize both the supply and pricing of potato, returning them to a normal range thereafter.

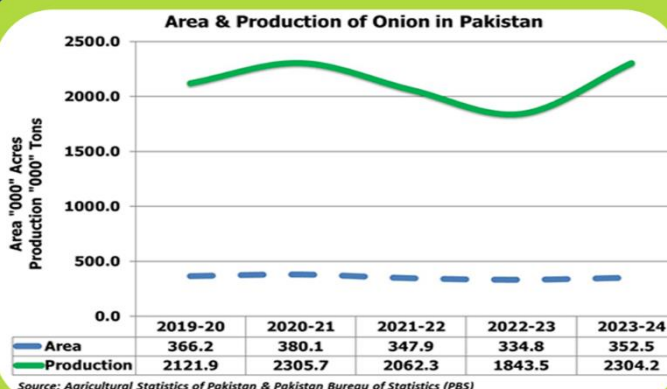


Advisory

- Local production season of potato in Soon Valley & Gujranwala is going to commence. However, sowing season in core production areas is in progress. Therefore, Agriculture Department (Extension wing) should expedite extension services to encourage farmers for increased cultivation area of potato in order to attain a better crop.

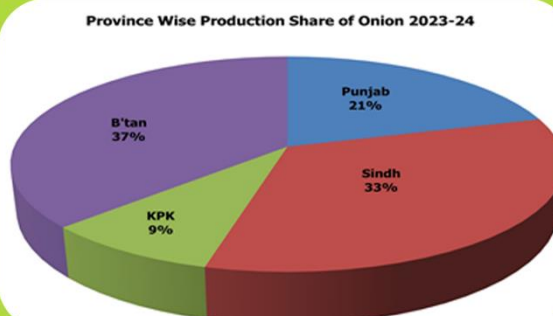
Onion

- Onion is a critical agricultural commodity, significantly impacting both the economy and food security. From a nutritional standpoint, onions are rich in vitamins, minerals, and antioxidants, enhancing the dietary quality of the local population. Their versatility extends beyond culinary applications; onions are used in various forms, including fresh consumption, dehydration, and processing into sauces and pickles, which further diversifies market opportunities. The onion crop also needs a focus of agronomic research aimed at improving crop resilience, yield, and disease management, addressing challenges posed by climate change and enhancing production window. Additionally, the export potential of onions provides an avenue for increasing foreign exchange earnings, thereby, underscoring their importance not only in local markets but also in international trade.



- In terms of onions, domestic production falls significantly short of meeting consumption requirements, making it essential to import onions from Afghanistan and Iran to satisfy local demand. In the 2023-24 year, total domestic onion production increased from 1,843,500 tons to 2,304,200 tons, and the cultivated area expanded from 334,800 to 352,500 acres.

- The shares of domestic onion production by province are as follows: Punjab accounts for 21%, Sindh for 33%, KPK for 9%, and Baluchistan for 37%.

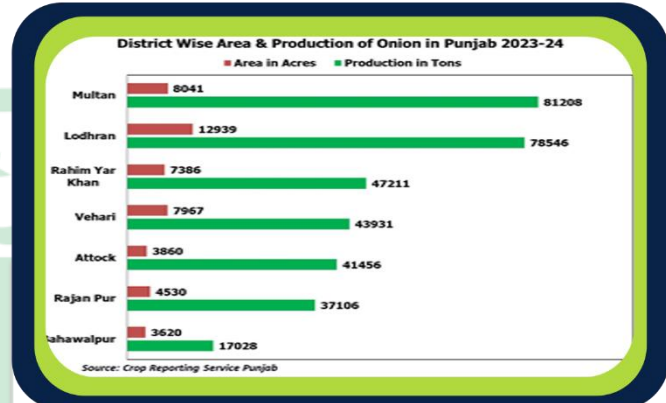
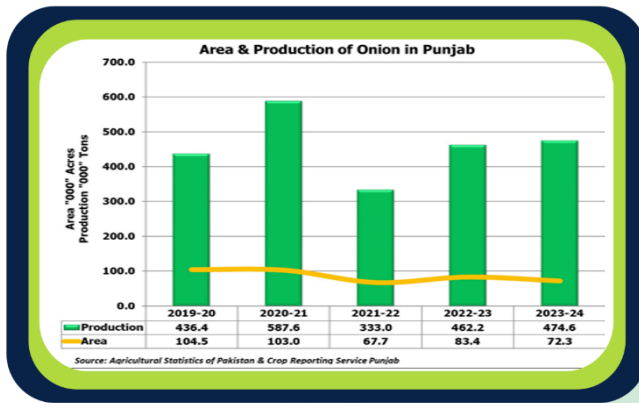




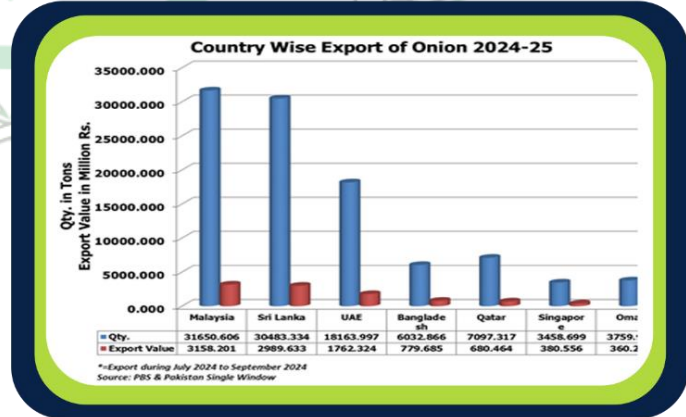
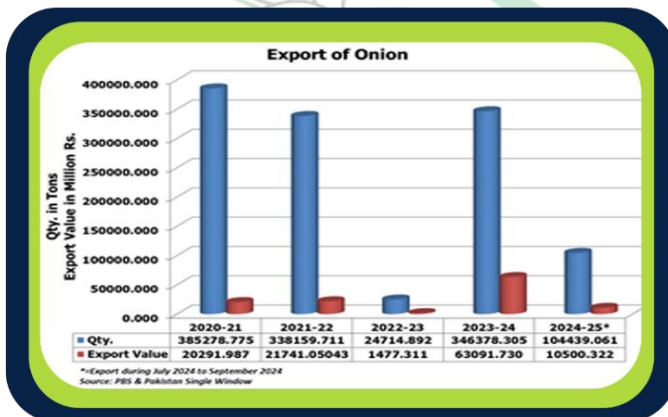
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- Onion production in Punjab has risen from 462,214 tons to 474,621 tons, reflecting a 2.68% increase compared to the previous year. However, the area dedicated to onion cultivation in Punjab has decreased from 83,400 acres to 72,300 acres, representing a 13.3% decline from last year.



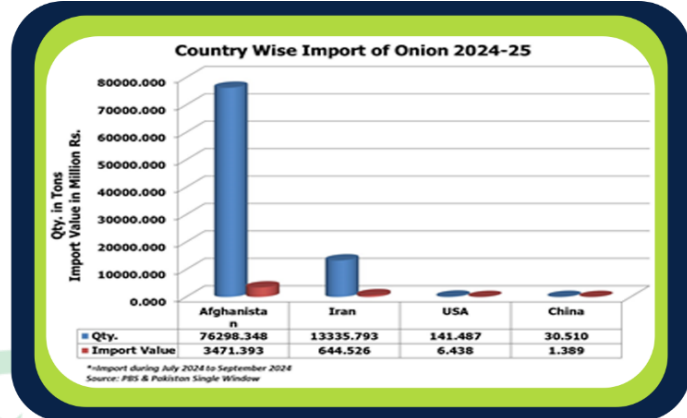
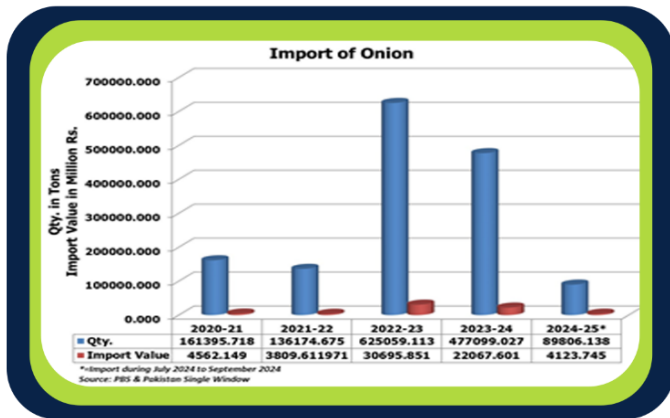
- Thanks to improved onion production this year, exports have surged from 24,715 tons to 346,000 tons in 2023-24, marking a remarkable 1,300% increase compared to the previous year, with an export value of USD 223.019 million.



- Conversely, onion imports have reached 477,099 tons, incurring an import bill of USD 78.005 million.



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- According to the supply cycle, onion supply from Punjab is available from March to July, while Sindh's supply occurs during June and July. KPK supplies onions from June to September, followed by Baluchistan, which provides onions from June to November. There is a lean production period from September to December, necessitating imports during this time to meet consumption needs.



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	Jamshoro, Mirpurkhas, Matiari, Sanghar & Shaheed Benazir Abad etc.	June – July & November – April
KPK	Swat, Dir Lower, Malakand, Dir Upper & Muhmand etc.	June – September
Baluchistan	Khuzdar, Kharan, Nasirabad, Washuk & Kalat etc.	June - November

Assessment



- At present, the primary sources of onion supply in local markets are Afghanistan (45%) and Baluchistan (30%), with additional supplies coming from Sindh and KPK. Due to the supply falling short of demand, prices remain elevated. This supply strain is anticipated to persist until December 2024, when supplies from Sindh are expected to begin, after which prices are likely to normalize.

Forecast

- Onion prices are expected to stay elevated until December 2024. Following this period, the Sindh onion crop will become available in the markets, and both the supply and pricing of onions are anticipated to return to a normal range.

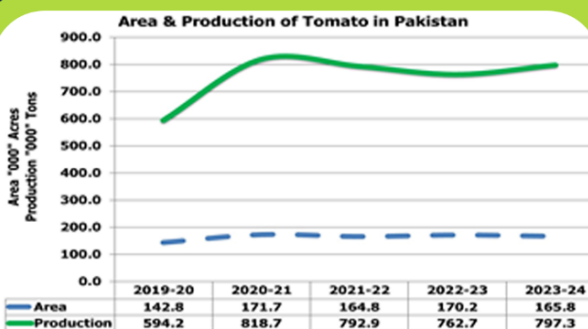


Advisory

- District Administrations are advised to keep close liaison local with commission agents to bring maximum supply of onion with the help of their counterparts based in Afghanistan & Baluchistan. Moreover, production season of onion is going to start in Sindh, therefore, commission agents may be persuaded to undertake timely advance contracts for ensuring smooth supply and stable prices of onion in coming days.

Tomato

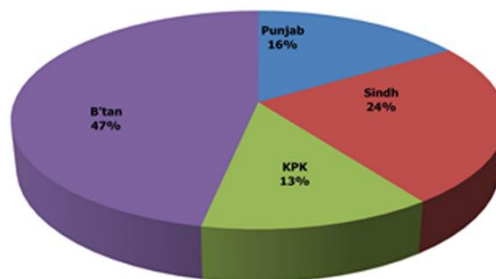
- Tomato is a crucial agricultural crop globally and hold significant importance in Pakistan, particularly in the culinary and economic spheres. As a versatile ingredient, tomatoes are essential in a wide range of dishes, from sauces and soups to salads and curries, making them a staple in both household cooking and commercial food preparation. Nutritionally, tomatoes are rich in vitamins C and K, potassium, and antioxidants, contributing to overall health and well-being. Economically, the cultivation of tomatoes provides livelihoods for many farmers and supports local economies, especially in regions like Punjab and Sindh, which are major production areas.



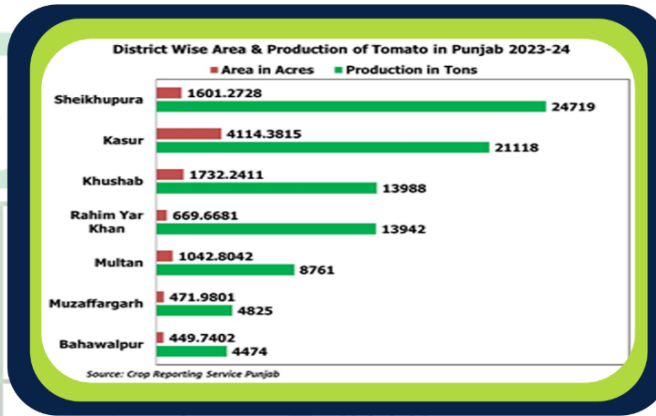
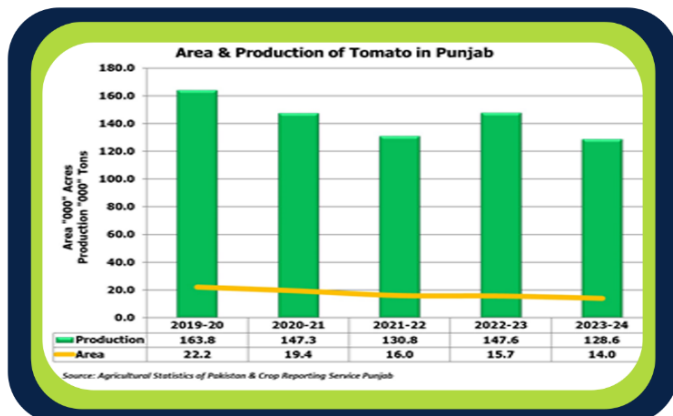
- Unfortunately, total domestic tomato production is insufficient to meet the consumption requirements. In the 2023-24 year, domestic tomato production increased from 762,700 tons to 797,300 tons compared to the previous year, while the area cultivated decreased from 170,200 acres to 165,800 acres.

- Provincial shares of Punjab, Sindh, KPK and Baluchistan in domestic production of tomato are 16%, 24%, 13%, 47%, respectively.

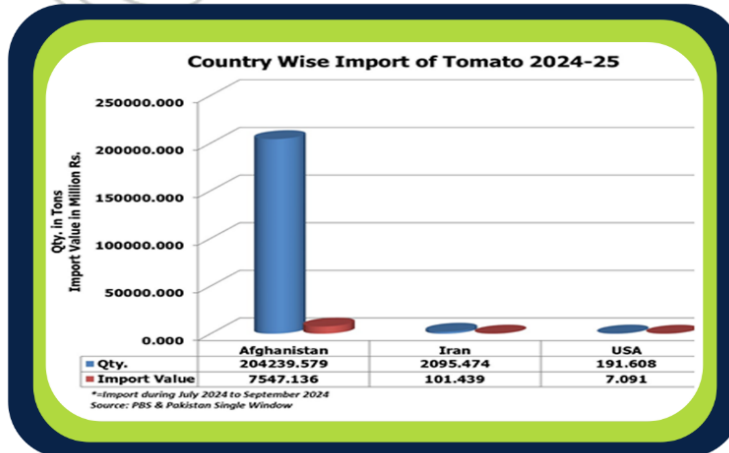
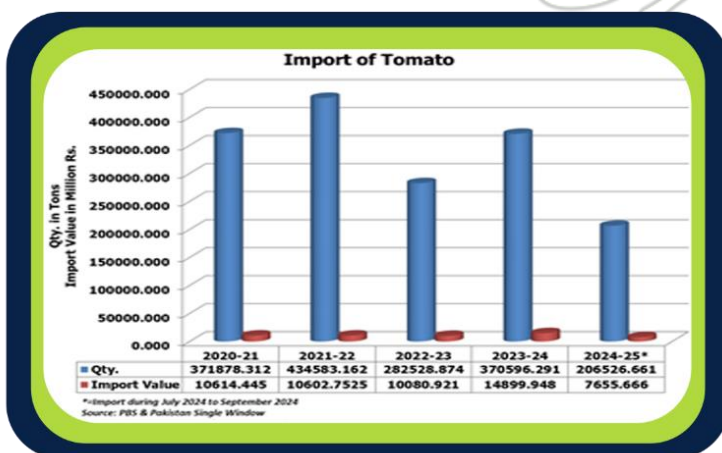
Province Wise Production Share of Tomato 2023-24



- The tomato production season in Punjab runs from April to June. In the 2023-24 year, the estimated tomato production in Punjab is recorded at 128,579 tons, which represents a 12.88% decrease from last year's production of 147,583 tons. Similarly, the area under cultivation has declined from 15,700 acres to 14,000 acres, reflecting a 10.83% reduction compared to the previous year.



- Due to insufficient domestic production, the country relies on tomato imports, particularly from Afghanistan and Iran, to meet local demand. In the 2023-24-year, tomato imports reached 370,596 tons, with an associated import bill of USD 52.669 million. The period from September to December is expected to be a lean season, as domestic supply begins to decline gradually while the share of imports increases.

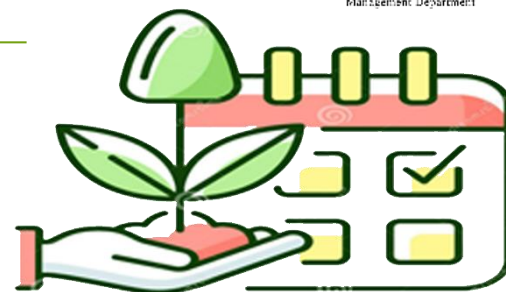




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- Production season of tomato in Punjab prevails during April to June, thereafter, production season in KPK takes place during June to November, and then supply starts from Baluchistan during End-June to mid-November and then supply from Sindh remains available from December to April.



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
KPK	Swat, Tank, Malakand, Charsada & Kurram etc.	June – November
Balochistan	Lasbela, Barkhan, Killa Saifullah, Nasirabad & Kalat etc.	End June – Mid November

Assessment

- Currently, Punjab is in an off-production phase, leading to the main supply of tomatoes coming from KPK (55%) and Afghanistan (24%) in local markets, with some supply also arriving from Baluchistan. As a result of the local off-production season, there is increasing pressure on the supply and pricing of tomatoes in the markets. This stress is expected to persist until December 2024, with consumption needs being met through imports. Following that, the supply of tomatoes from Sindh is anticipated to begin, which may help alleviate the supply and price pressures.





Forecast

- Tomato prices are expected to remain on higher side till December 2024, thereafter, supply & price situation of tomato are likely to be normal due to arrival of Sindh crop of Tomato.

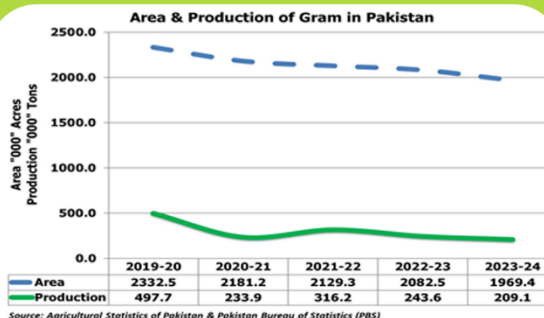


Advisory

- District Administration is advised to keep close liaison with commission agents to bring maximum supply with the help of their counterparts based in KPK and Afghanistan. Moreover, production season of tomato is going to start in Sindh, therefore, commission agents may be persuaded to undertake timely advance contracts in Sindh for ensuring smooth supply and help stabilize prices of tomato in local markets.



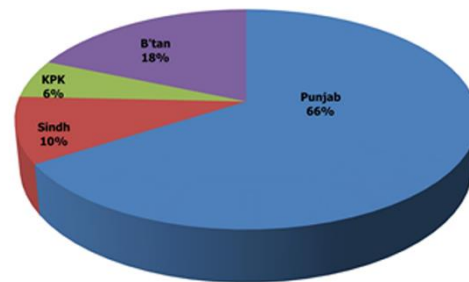
Gram



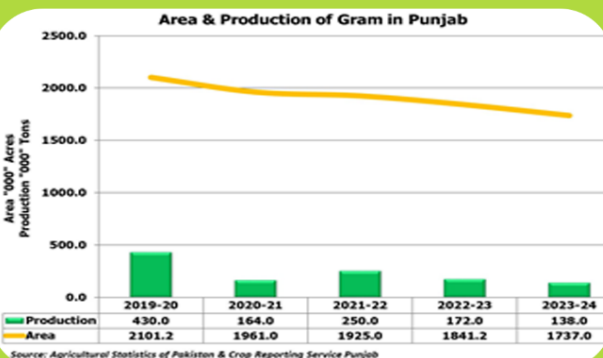
- The domestic production of Gram is gradually declining, during year 2023-24 domestic production of Gram has been declined from 2,43,600 tons to 2,09,100 tons over the last year, similarly area has also been decreased from 20,82,500 to 19,69,400 acres.

- Provincial share of Punjab, Sindh, KPK and Baluchistan in domestic production of Gram is 66%, 10%, 6% and 18%, respectively.

Province Wise Production Share of Gram 2023-24



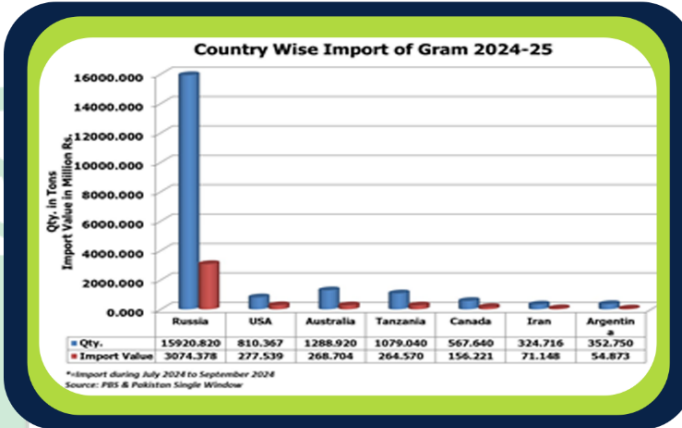
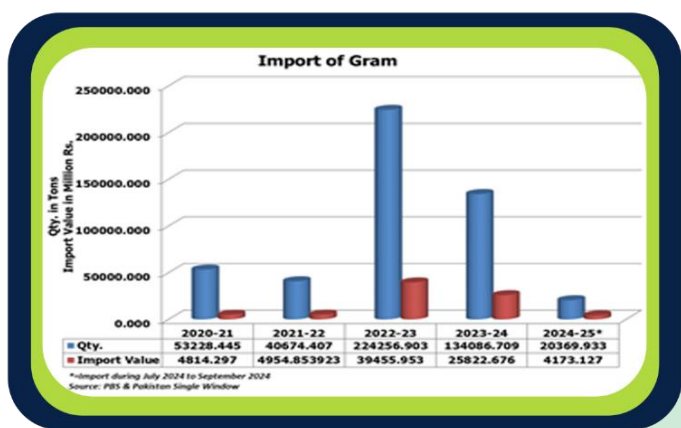
- Production statistics reflect that area and production of Gram in Punjab are tumbling, as during year 2023-24 production has decreased from 1,72,000 tons to 1,38,000 tons and area also decreased from 18,41,200 to 17,37,000 acres over the last year. Major Gram producing districts in Punjab are Bhakkar, Khushab, Jhang, Layyah, Talagang, Mianwali and Chakwal.



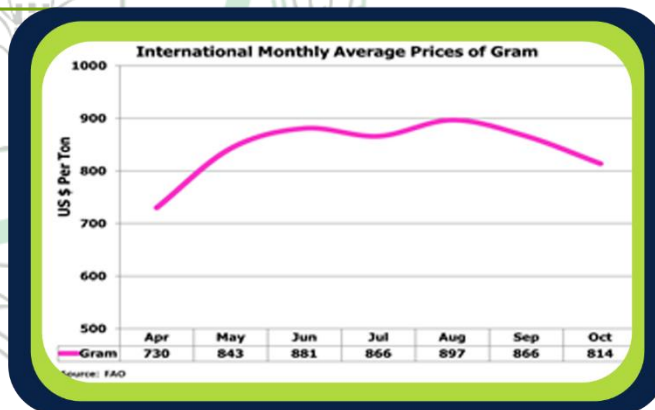
District Wise Area & Production of Gram in Punjab 2023-24



- As a result of low domestic production, Gram is imported from other countries i.e. Russia, USA, Australia, Tanzania, Canada, Iran and Argentina to meet domestic consumption requirement. During year, 2023-24, 1,34,086 tons of Gram has been imported against import bill of USD 91.279 million.



- This year India purchased bulk quantity of Gram from international market, therefore, international prices of Gram have increased from USD 730/ton to USD 897/ton during April to August. Accordingly local prices also remained on higher side. However, production season of Gram has been commenced in Australia during October, therefore, international price of Gram has started to decline.



Assessment

- Due to gradual decline in production of Gram, import is imperative to meet domestic consumption requirement. Sowing time of Gram crop is about to commence, so Agriculture Department (Extension wing) may expedite extension services to encourage farmers to enhance cultivation area of Gram.



Forecast

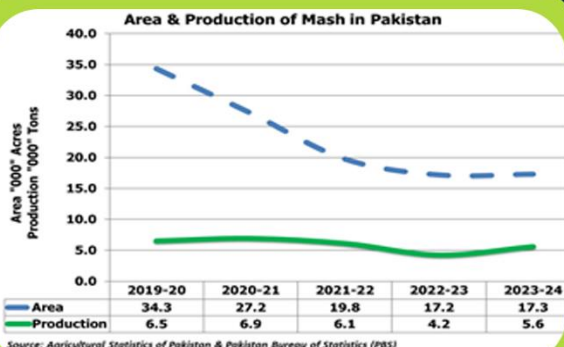
- The prices of Gram are expected to remain on higher side due to high international prices. However, During April, 2025 local crop of Gram will start to arrive in the market, thereafter local prices of Gram are likely to decrease.



Advisory

- International price of Gram has started to decline due to start of production season in Australia, therefore importers should utilize this opportunity and place maximum import orders to reduce the gap between demand & supply of Gram in local markets. Commissioner Faisalabad and Sargodha Divisions are requested to engage Daal Mills Association to secure supplies and take benefit of reduced prices in the international markets. Moreover, local sowing season of Gram is going to start in November, therefore Agriculture Department (Extension wing) should encourage farmers to enhance cultivation area and production of Gram.

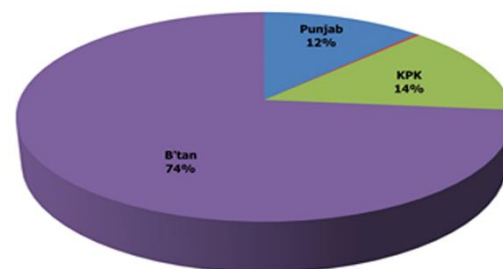
Mash



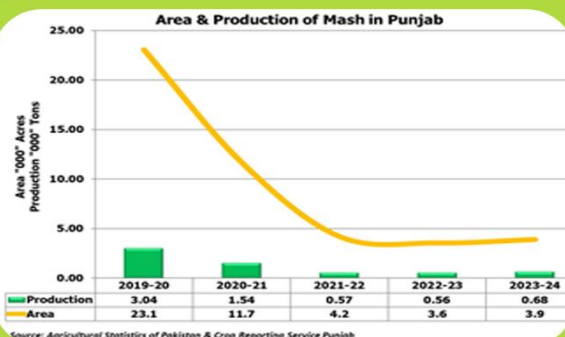
- Domestic production of Mash is negligible therefore most of consumption requirements are met through import from other countries. Moreover, domestic production and area of Mash are also showing decreasing trend, during year 2023-24 domestic production of Mash has been recorded 5,600 tons, which has been decreased from 6,500 tons during last five years, similarly area has also been decreased from 34,300 to 17,300 acres since year 2019-20.

- Provincial share of Punjab, KPK and Baluchistan in domestic production of Mash is 12%, 14% and 74%, respectively. Area and production of Mash in Sindh is negligible.

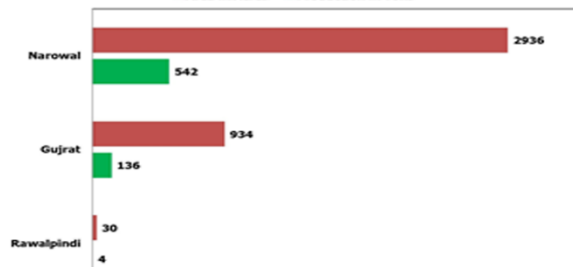
Province Wise Production Share of Mash 2023-24



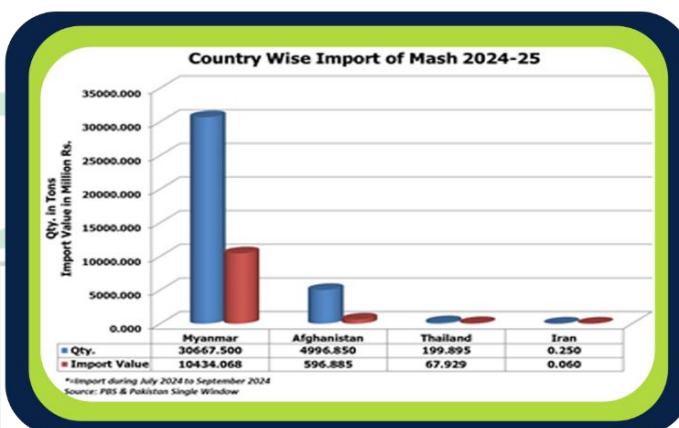
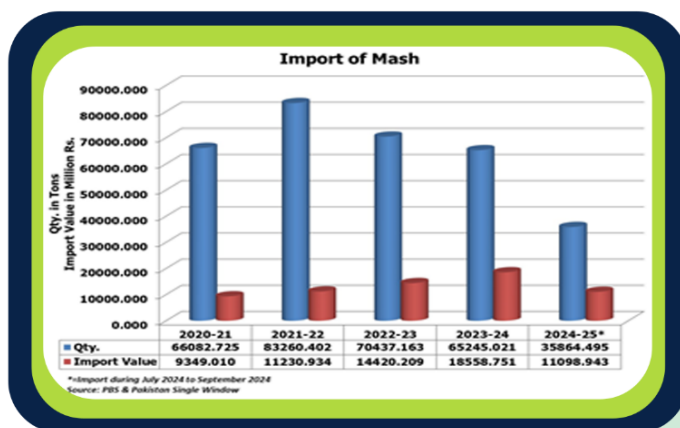
- Production statistics reflect that area and production of Mash in Punjab have been significantly decreased as during year 2023-24 production has decreased from 3,040 to 680 tons and area also decreased from 23,100 to 3,900 acres since year 2019-20. Major Mash producing districts in Punjab are Narowal, Gujrat and Rawalpindi.



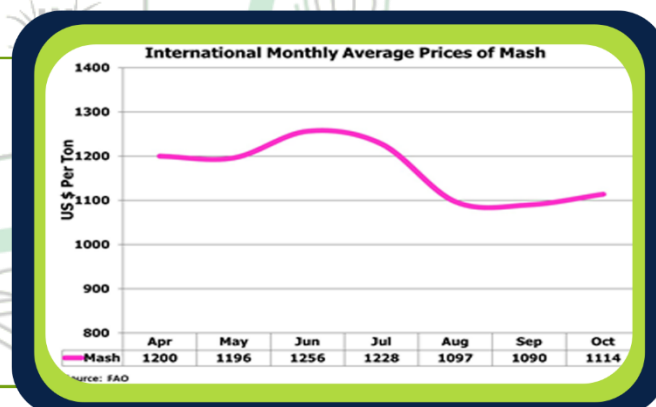
District Wise Area & Production of Mash in Punjab 2023-24



- As a result of low domestic production, Mash is imported from other countries i.e. Myanmar, Afghanistan, Thailand & Iran to meet domestic consumption requirement. During year, 2023-24 65245 tons of Mash has been imported against import bill of USD 65.602 million.



- As per marker report, India has stopped purchase of Mash from international market, therefore international prices of Mash have decreased from USD 1228 /ton to USD 1114/ton during last seven months due to which local prices are also showing decreasing trend.



Assessment

- On account of minute domestic production, Mash is mostly imported from other countries. As India has stopped purchasing further therefore international prices have decreased and same trend is being observed in local markets.





Forecast

- Prices of Mash are expected to remain stable. Moreover, fresh crop of Myanmar will start to arrive in February - March 2025, thereafter, supply and price of Mash are likely to decline in local markets.



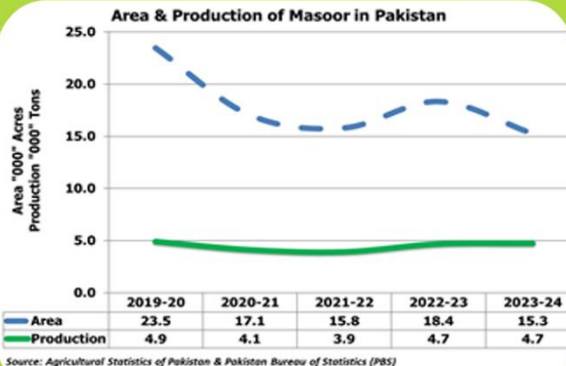
Advisory

- Keeping in view reduced international prices of Mash, importers may be persuaded to place maximum import orders as per demand so that prices of Mash may remain within reasonable limits in local markets. Commissioner Faisalabad and Sargodha Divisions are requested to engage Daal Mills Association to secure supplies and take benefit of reduced prices in the international markets.



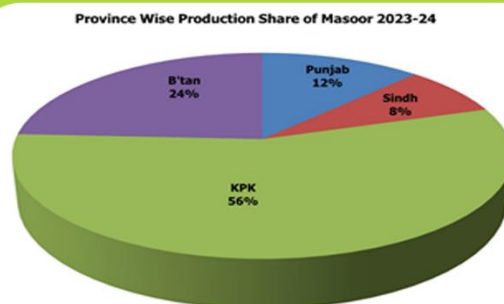


Masoor

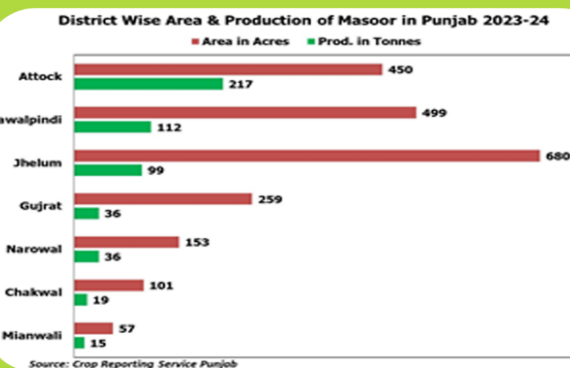
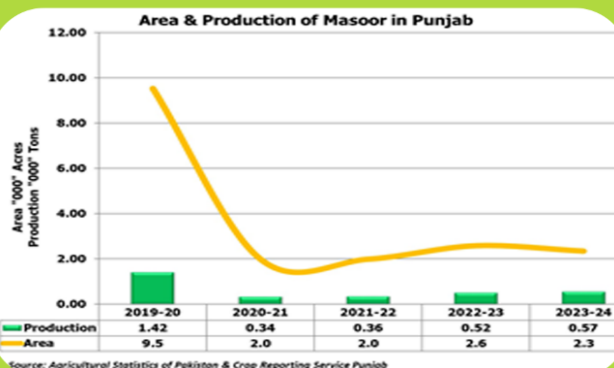


- Domestic production of Masoor is also very minute therefore most of consumption requirements are met through import from other countries. Moreover, domestic production and area of Masoor are also showing decreasing trend, during year 2023-24 domestic production of Masoor has been recorded 4,700 tons, which has been decreased from 4,900 tons during last five years, similarly area has also been decreased from 23,500 to 15,300 acres since year 2019-20.

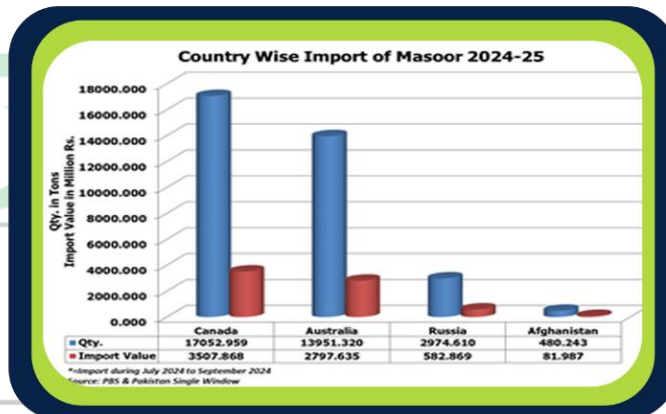
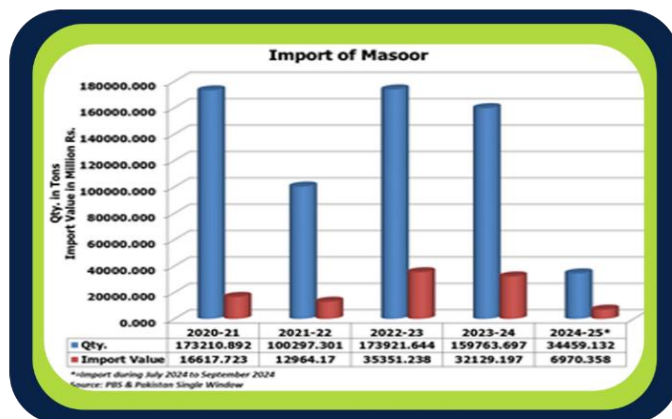
- Provincial share of Punjab, Sindh, KPK and Baluchistan in domestic production of Masoor is 12%, 8%, 56% and 24%, respectively.



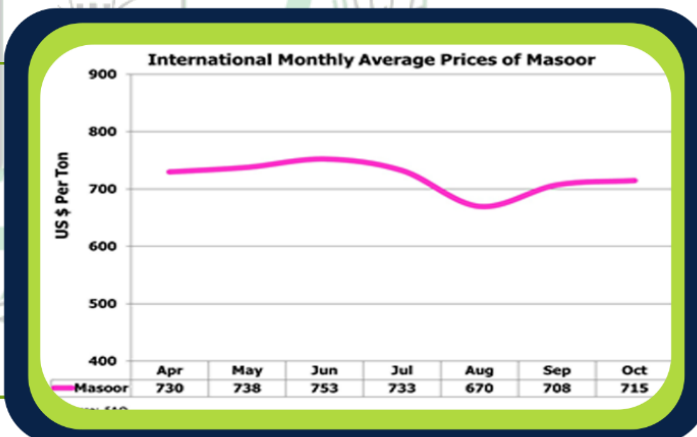
- Production statistics reflect that area and production of Masoor in Punjab have been significantly decreased as during year 2023-24 production has decreased from 1,420 tons to 573 tons and area also decreased from 9,500 acres to 2,300 acres since year 2019-20. Major Masoor producing districts in Punjab are Attock, Rawalpindi, Jhelum, Gujrat, Narowal, Chakwal, Mianwali.



- Due to low domestic production, Masoor is imported from other countries i.e. Canada, Australia, Russia, Afghanistan to meet domestic consumption requirement. During year, 2023-24, 159763 tons of Masoor has been imported against import bill of USD 113.571 million.



- New crop of Masoor from Canada has started to arrive during August-September 2024 therefore international prices of Masoor have decreased from USD 730 /ton to USD 715/ton during last seven months due to which local prices are also showing decreasing trend.



Assessment



- Due to arrival of new crop of Masoor from Canada, international prices are showing decreasing trend, similarly local prices are also showing decreasing trend. Moreover, sowing season of Masoor will commence by 15th November, 2024, so Agriculture Department (Extension wing) may expedite extension services to encourage farmers to enhance cultivation area of Masoor.



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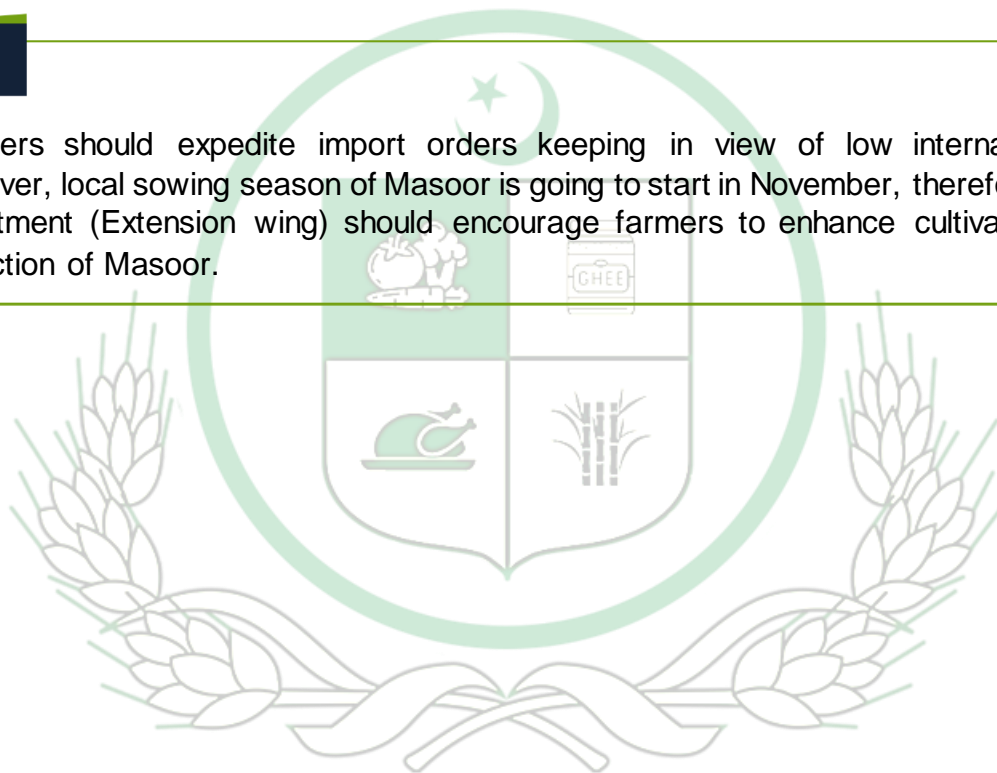
Forecast

- Prices of Masoor are expected to remain stable in the local markets subject to stability in international prices.



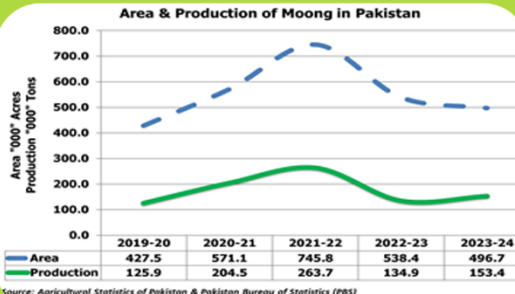
Advisory

- Importers should expedite import orders keeping in view of low international prices. Moreover, local sowing season of Masoor is going to start in November, therefore Agriculture Department (Extension wing) should encourage farmers to enhance cultivation area and production of Masoor.



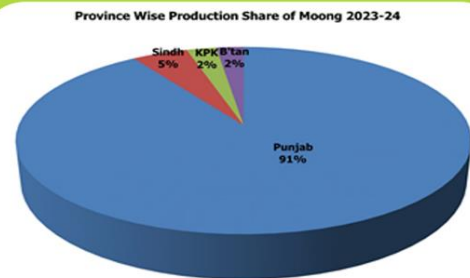


Moong

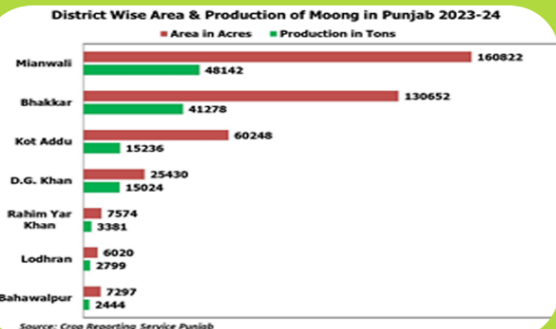
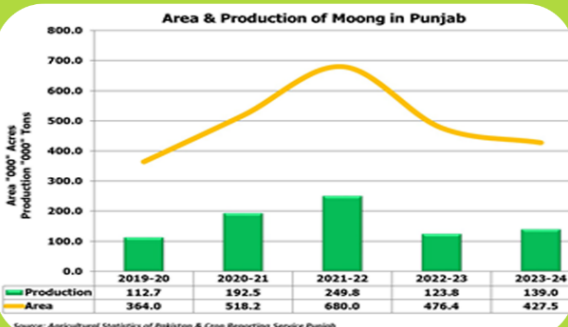


- Production and area of Moong are also decreasing gradually for last two years since 2021-2022. During year 2023-24 domestic production of Moong has been declined from 2,63,700 tons to 1,53,400 tons over the last two years, similarly area has also been decreased from 7,45,800 to 4,96,700 acres.

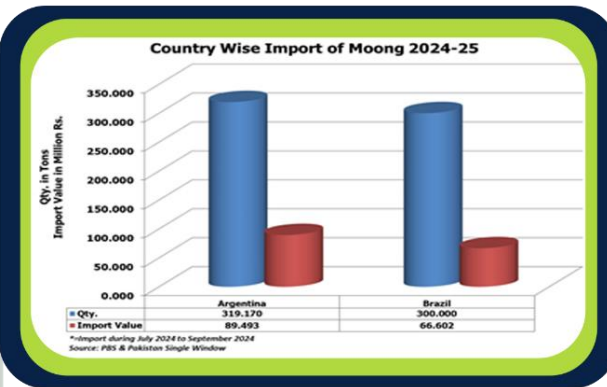
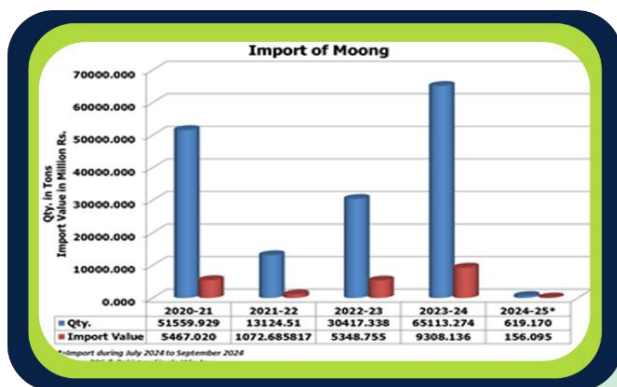
- Provincial share of Punjab, Sindh, KPK and Baluchistan in domestic production of Masoor is 91%, 5%, 2% and 2%, respectively.



- Production statistics reflect that area and production of Moong in Punjab have been significantly decreased as during year 2023-24 production has decreased from 2,49,800 tons to 1,39,000 tons and area also decreased from 6,80,000 acres to 4,27,500 acres since year 2021-22. Major Moong producing districts in Punjab are Mianwali, Bhakkar, Kot Addu, D.G. Khan, R.Y. Khan, Lodhran & Bahawalpur.



- To meet consumption requirement of Moong, Pakistan imports Moong from other countries i.e. Argentina & Brazil. During year, 2023-24, 65113 tons of Masoor has been imported against import bill of USD 32.903 million. Fresh local crop of Moong is arriving, but crop has been damaged due to rainfalls, therefore, significant decline could not be observed local prices.



Assessment

- Local crop of Masoor from Punjab is arriving in local markets but unfortunately this year crop has been damaged due to rainfalls, therefore prices of moong could not show significant decrease.

Forecast

- It is expected that prices of Moong are likely to remain same because prices of other pulses Mash and Masoor have declined therefore the demand of moong is expected to reduce and ultimately prices are expected to remain stable.



Advisory

- Prices of Moong are expected to decline because prices of Mash & Masoor have decreased, therefore demand of Moong will be less and prices will come in normal range due to substitution effect. However, District Administration may encourage dealers of pulses to arrange maximum supply of Moong as per requirement.