

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## India

**Post:** New Delhi

### Grain Voluntary Update - March 2014

**Report Categories:**

Grain and Feed

Agriculture in the Economy

Competitor

**Approved By:**

Allan Mustard

**Prepared By:**

Santosh Kumar Singh

**Report Highlights:**

On February 14, 2014, the Ministry of Agriculture forecast ICY 2013/14 grain production at 263.2 MMT, a record, and revised ICY 2012/13 grain production estimates. MY 2012/13 and MY 2013/14 rice, wheat, and corn production levels were raised on account of this new data.

## **Executive Summary:**

On February 14, 2014, the Ministry of Agriculture released the Second Advance Estimate for the Indian Crop Year (ICY) 2013/14 (July/June). The report forecasts ICY 2013/14 grain production at 263.2 MMT, a record. Marketing year (MY) 2013/14 rice production is raised to 105 MMT, which includes *kharif* and *rabi* rice. MY 2012/13 rice and corn production estimates, as well as the MY 2013/14 wheat production forecast, were revised based on new ICY 2012/13 grain production data.

## **General Information:**

### **The Ministry of Agriculture Forecasts Record Food Grain Production**

On February 14, 2014, the Ministry of Agriculture (MOA) released [the Second Advance Estimate for Production of Food Grains for the Indian Crop Year \(ICY\) 2013/14 \(July/June\)](#). The report forecasts ICY 2013/14 grain production at 263.2 MMT, a record. This figure includes rice (106.2 MMT), wheat (95.6 MMT), corn (23.3 MMT), and pulses (19.8 MMT). Good monsoons and overall favorable weather conditions from July 2013 to March 2014 boosted yields and area for major grains.

The MOA ICY 2013/14 grain production forecast includes:

- i. Rice, corn, sorghum, millet, and pulses, including *kharif* (harvested from October to December) and *rabi* crops (harvested from March to May).
- ii. MY 2014/15 wheat and barley crops (harvested from March to May).

The MOA will further revise the ICY 2013/14 estimate in May (third advance estimate) and July (fourth advance estimate) using state government data on acreage and yields for both *kharif* and *rabi* crops. The MOA will likely finalize the ICY 2013/14 food grain production estimate in February 2015.

### **MY 2013/14 Rice Production Raised on Strong *Kharif* Rice Crop**

MY 2013/14 rice production is raised to 105 MMT (*kharif* and *rabi* rice production are forecast at 92 MMT and 13 MMT) on strong *kharif* rice yields due to good weather. Some industry sources believe that the MOA ICY 2013/14 forecast for *rabi* rice production (14.2 MMT) is too high due to expectations of average yields and competing acreage. *Rabi* rice planting is under progress and likely to continue from March to April.

MY 2013/14 corn production is unchanged at 23 MMT, slightly below the MOA ICY 2013/14 forecast of 23.3 MMT. Post believes the 2<sup>nd</sup> advance estimate of *rabi* corn production (6.4 MMT, a record) is too high based on Post observations and industry sources. The MY 2014/15 wheat production forecast is unchanged.

### **MY 2012/13 Rice, Corn, and Wheat Production Up on Higher Yields**

MOA published the final ICY 2012/13 grain production estimate, up 1.8 MMT to 257.1 MMT on higher state government yield data for rice, wheat, and corn (data encompasses both *kharif* (fall harvested) and *rabi* (spring harvested) crops). Post increased MY 2012/13 rice and corn production, as well as MY 2013/14 wheat production, due to new state government figures.

**Table 1. India: Commodity, Rice, Milled, PSD**  
(Area in Thousand Hectares, Others in Thousand Metric Tons)

Rice, Milled India	2012/2013		2013/2014		2014/2015	
	Market Year Begin: Oct 2012		Market Year Begin: Oct 2014		Market Year Begin: Oct 2014	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	42,410	42,410	43,500	43,500		44,000
Beginning Stocks	25,100	25,100	25,100	25,440		24,440
Milled Production	104,400	105,240	103,000	105,000		104,000
Rough Production	156,616	157,876	154,515	157,516		156,016
Milling Rate (.9999)	6,666	6,666	6,666	6,666		6,666
MY Imports	0	0	0	0		0
TY Imports	0	0	0	0		0
TY Imp. from U.S.	0	0	0	0		0
Total Supply	129,500	130,340	128,100	130,440		128,440
MY Exports	10,900	10,900	10,000	10,000		8,000
TY Exports	10,500	10,500	10,000	10,000		8,000
Consumption and Residual	93,500	94,000	95,000	96,000		99,000
Ending Stocks	25,100	25,440	23,100	24,440		21,440
Total Distribution	129,500	130,340	128,100	130,440		128,440

**Table 2. India: Commodity, Wheat, PSD**  
(Area in Thousand Hectares, Others in Thousand Metric Tons)

Wheat India	2012/2013		2013/2014		2014/2015	
	Market Year Begin: Apr 2012		Market Year Begin: Apr 2013		Market Year Begin: Apr 2014	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	29,860	29,860	29,400	29,600		31,500
Beginning Stocks	19,950	19,950	24,200	24,200		19,000
Production	94,880	94,880	92,460	93,510		96,000
MY Imports	16	16	20	20		0
TY Imports	20	20	20	20		0
TY Imp. from U.S.	0	0	0	0		0
Total Supply	114,846	114,846	116,680	117,730		115,000
MY Exports	6,824	6,824	6,500	6,000		3,000
TY Exports	8,648	8,648	5,500	5,500		3,000
Feed and Residual	3,400	3,400	3,500	4,800		4,500

FSI Consumption	80,422	80,422	86,480	87,930		88,000
Total Consumption	83,822	83,822	89,980	92,730		92,500
Ending Stocks	24,200	24,200	20,200	19,000		19,500
Total Distribution	114,846	114,846	116,680	117,730		115,000

**Table 3. India: Commodity, Corn, PSD**  
(Area in Thousand Hectares, Others in Thousand Metric Tons)

Corn India	2012/2013		2013/2014		2014/2015	
	Market Year Begin: Nov 2012		Market Year Begin: Nov 2013		Market Year Begin: Nov 2014	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	8,710	8,910	9,400	9,500		9,000
Beginning Stocks	570	570	619	649		1,559
Production	22,230	22,260	23,000	23,000		22,000
MY Imports	10	10	10	10		10
TY Imports	10	10	10	10		10
TY Imp. from U.S.	0	0	0	0		0
Total Supply	22,810	22,840	23,629	23,659		23,569
MY Exports	4,691	4,691	3,000	3,000		2,500
TY Exports	4,768	4,768	3,000	3,000		2,500
Feed and Residual	8,900	8,900	10,100	10,100		10,800
FSI Consumption	8,600	8,600	9,000	9,000		9,500
Total Consumption	17,500	17,500	19,100	19,100		20,300
Ending Stocks	619	649	1,529	1,559		769
Total Distribution	22,810	22,840	23,629	23,659		23,569