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Bangladesh

Grain and Feed

Quarterly Lock-up Report

2006

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Report Highlights:

Post revises its MY 2005/06 (July-June) rice production estimate up to 28.8 million tons, and the wheat production estimate down to 820,000 tons. MY 2005/06 rice and wheat import estimates are lowered to 560,000 tons and 1.8 million tons, respectively.

Includes PSD Changes: Yes
Includes Trade Matrix: No
Unscheduled Report
New Delhi [IN1]
[BG]

Table of Contents

Record rice harvest in MY 2005/06 3
Rice: Area and Production Estimate by Season..... 3
Rice Imports 3
MY 2005/06 Wheat Production Lower 3
Wheat Imports..... 3
Table 1: Commodity, Rice, Milled, PSD..... 4
Table 2: Commodity, Wheat, PSD 5

Record rice harvest in MY 2005/06

Post revises its MY 2005/06 rice production estimate upward to a record 28.8 million tons. The *Boro* rice crop (planted in December/January and harvested in April/May) benefited from excellent weather conditions, particularly during the grain maturation and harvest stages, resulting in a record harvest of 14.5 million tons. The previous *Aus* and *Aman* crops were also generally untouched by floods and droughts, resulting in good harvests.

In view of the excellent outlook for this year's *Aus* and *Aman* season crops, and assuming another record *Boro* harvest next year, Post's MY 2006/07 rice production forecast is revised upward to 29.2 million tons.

Rice: Area and Production Estimate by Season

| Crop | 2005/06 (Estimate) | | 2006/07 (Forecast) | |
|-------------------|--------------------|------------------|--------------------|------------------|
| | Area (tha) | Production (tmt) | Area (tha) | Production (tmt) |
| <i>Aus</i> | 1,090 | 2,058 | 1,040 | 1,850 |
| <i>Aman</i> | 5,760 | 12,200 | 5,800 | 12,500 |
| <i>Boro</i> | 4,250 | 14,500 | 4,400 | 14,800 |
| Total Rice | 11,100 | 28,758 | 11,240 | 29,150 |

Rice Imports

In view of the record MY 2005/06 rice harvest, Post's rice import estimate is lowered to 560,000 tons. There is no change in the MY 2006/07 rice import forecast, which stands at 600,000 tons.

MY 2005/06 Wheat Production Lower

Post lowers its MY 2005/06 (July-June) wheat production estimate to 820,000 tons, due a decline in planted area to an estimated at 480,000 hectares, which, in turn, is in response to competition from other winter crops such as corn and vegetables. Wheat acreage in MY 2006/07 is forecast to dip further to 450,000 hectares, and production down to 780,000 tons.

Wheat Imports

In the face of higher rice production and relatively high international prices for wheat, Post continues to estimate MY 2005/06 wheat imports at 1.8 million tons. The MY 2006/07 wheat import forecast also remains unchanged at 2 million tons.

Table 1: Commodity, Rice, Milled, PSD

| PSD Table | | | | | | | |
|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|-----------|
| Country | Bangladesh | | | | | | |
| Commodity | Rice, Milled | | | | (1000 HA) (1000 MT) | | |
| | 2004 | Revised | 2005 | Estimate | 2006 | Forecast | UOM |
| | USDA Official [Old] | Post Estimate [New] | USDA Official [Old] | Post Estimate [New] | USDA Official [Old] | Post Estimate [New] | |
| Market Year Begin | | 07/2004 | | 07/2005 | | 07/2006 | MM/YYYY |
| Area Harvested | 11000 | 11000 | 11100 | 11100 | 11200 | 11240 | (1000 HA) |
| Beginning Stocks | 744 | 744 | 169 | 439 | 527 | 757 | (1000 MT) |
| Milled Production | 25600 | 25600 | 28758 | 28758 | 29100 | 29150 | (1000 MT) |
| Rough Production | 38404 | 38404 | 43141 | 43141 | 43654 | 43729 | (1000 MT) |
| MILLING RATE (.9999) | 6666 | 6666 | 6666 | 6666 | 6666 | 6666 | (1000 MT) |
| TOTAL Imports | 725 | 1295 | 600 | 560 | 600 | 600 | (1000 MT) |
| Jan-Dec Imports | 785 | 897 | 600 | 992 | 600 | 600 | (1000 MT) |
| Jan-Dec Import U.S. | 0 | 0 | 0 | 0 | 0 | 0 | (1000 MT) |
| TOTAL SUPPLY | 27069 | 27639 | 29527 | 29757 | 30227 | 30507 | (1000 MT) |
| TOTAL Exports | 0 | 0 | 0 | 0 | 0 | 0 | (1000 MT) |
| Jan-Dec Exports | 0 | 0 | 0 | 0 | 0 | 0 | (1000 MT) |
| TOTAL Dom. Consumption | 26900 | 27200 | 29000 | 29000 | 29750 | 30000 | (1000 MT) |
| Ending Stocks | 169 | 439 | 527 | 757 | 477 | 507 | (1000 MT) |
| TOTAL DISTRIBUTION | 27069 | 27639 | 29527 | 29757 | 30227 | 30507 | (1000 MT) |

Table 2: Commodity, Wheat, PSD

| PSD Table | | | | | | | |
|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|-----------|
| Country | Bangladesh | | | | | | |
| Commodity | Wheat | | | | | (1000 HA) (1000 MT) | |
| | 2004 | Revised | 2005 | Estimate | 2006 | Forecast | UOM |
| | USDA Official [Old] | Post Estimate [New] | USDA Official [Old] | Post Estimate [New] | USDA Official [Old] | Post Estimate [New] | |
| Market Year Begin | | 07/2004 | | 07/2005 | | 07/2006 | MM/YYYY |
| Area Harvested | 556 | 556 | 570 | 480 | 600 | 450 | (1000 HA) |
| Beginning Stocks | 358 | 358 | 193 | 193 | 193 | 63 | (1000 MT) |
| Production | 976 | 976 | 1000 | 820 | 1100 | 780 | (1000 MT) |
| TOTAL Mkt. Yr. Imports | 2009 | 2009 | 2100 | 1800 | 2000 | 2000 | (1000 MT) |
| Jul-Jun Imports | 2009 | 2009 | 2100 | 1800 | 2000 | 2000 | (1000 MT) |
| Jul-Jun Import U.S. | 78 | 78 | 0 | 65 | 0 | 60 | (1000 MT) |
| TOTAL SUPPLY | 3343 | 3343 | 3293 | 2813 | 3293 | 2843 | (1000 MT) |
| TOTAL Mkt. Yr. Exports | 0 | 0 | 0 | 0 | 0 | 0 | (1000 MT) |
| Jul-Jun Exports | 0 | 0 | 0 | 0 | 0 | 0 | (1000 MT) |
| Feed Dom. Consumption | 0 | 0 | 0 | 0 | 0 | 0 | (1000 MT) |
| TOTAL Dom. Consumption | 3150 | 3150 | 3100 | 2750 | 3100 | 2800 | (1000 MT) |
| Ending Stocks | 193 | 193 | 193 | 63 | 193 | 43 | (1000 MT) |
| TOTAL DISTRIBUTION | 3343 | 3343 | 3293 | 2813 | 3293 | 2843 | (1000 MT) |