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India

Grain and Feed

Annual

2005

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Report Highlights:
India's MY 2005/06 wheat and rice production are both forecast higher, assuming normal weather conditions. Despite higher production, exports are likely to decline, as Indian grains are not competitive in the world market without the government subsidy. However, a tightening of world supplies and higher international prices have generated an interest in Indian rice recently, which should give a boost to rice exports during the early part of CY 2005. Indian corn exports have declined sharply following lower domestic production and low international prices. Corn imports are constrained by the 15 percent in-quota import duty, among other market access barriers.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
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SECTION I: SITUATION AND OUTLOOK

Note: In the PSD tables, revised official figures are used for 2003. As a result the 'old' and 'new' estimates do not match.

WHEAT

Production

India's MY 2005/06 wheat production is forecast at 74 million tons, 2 million tons higher than the 2004 production, but 2.4 million tons below the 2000 record production of 76.4 million tons. Most of the increase is expected in the state of Madhya Pradesh. Despite favorable planting conditions, wheat-planted area is estimated to have shrunk marginally to 26.3 million hectares due to the diversion to the less irrigation intensive and more remunerative rapeseed crop. The cool January temperatures combined with isolated winter rains provided healthy growing conditions, which should result in a higher yield, estimated at 2,814 kg per hectare, compared with 2,707 kg per hectare last year. However, a sudden rise in February temperatures as in last year, or untimely rains at harvest time, could affect crop size and quality. The government has adequate supplies of fertilizers and other farm inputs. Irrigation availability this year is also a shade better than last year. Almost 88 percent of the wheat-planted area has assured irrigation facilities, making it less dependent on rains.

The quality of this year's crop will largely depend on the weather conditions from mid-February through harvest in mid-April. A sudden temperature rise in February, accompanied by warm westerly winds, would cause grain shriveling; rains at harvest time could result in high moisture level and luster loss. Indian wheat is largely soft/medium hard, medium protein, bread wheat, suitable for making *rotis* (unleavened flat bread), and mostly falls under US Grade III or below. There is a small production of durum wheat (about 1.5 million tons), mostly in central and western India, which is not segregated and marketed separately. The government's policy of paying a uniform support price for wheat, irrespective of the quality, has led farmers in the surplus states to focus on yields and neglect quality.

After registering a 50 percent increase in wheat production between 1990 and 2000, spurred by remunerative support prices and the availability of subsidized farm inputs, India's wheat production growth has since turned negative. This should be of concern considering the fact that population growth alone would bring an additional demand of 1.3 to 1.5 million tons of wheat per year, and there has been no compensating increase in the production of other cereal crops like rice and coarse grains. Although a great potential exists to increase the wheat yield, considering the fact that the existing yield gap between actual and potential is almost 40 percent, realizing that potential is hampered by the lack of extension services and inadequate resources with farmers. The annual yield growth rate has sharply decelerated from 3.3 percent in the 1980s to 1.4 percent in the period 1992 to 2003. Since a further growth in wheat area is unlikely, due to increased competition from competing crops like oilseeds and the focus on crop diversification in some major wheat growing states, any future growth in wheat production will have to come mostly from higher yields. Although the Indian government realizes that biotechnology can be a valuable tool in meeting growing agricultural demands while lessening the strain on the country's natural resources, at present there is very little focus on applying biotechnology to wheat.

Consumption

Wheat consumption in MY 2005/06 is forecast at 73.0 million tons. Factors contributing to higher consumption are the forecast higher production and the government's decision to launch a national food-for-work program that seeks to provide food-linked employment

opportunities to poor people in 150 of the most underdeveloped districts in the country. According to a recent report by the Commission on Agricultural Costs and Prices, the demand for wheat and wheat products is likely to rise with a change in dietary habits corresponding to increasing urbanization. The steep decline in government wheat stocks, combined with high open market prices for wheat vis-à-vis corn, will likely discourage animal feed consumption of wheat in MY 2005/06.

The use of branded wheat flour manufactured and marketed by large companies is also increasing in urban areas, although some of these have wound up their operations following increased marketing costs and declining profit margins.

There are some 1,000 medium/large roller flour mills in the country with an annual milling capacity of over 24 million tons, producing mostly *maida* (wheat flour), *suji* (semolina), and whole meal flour. Processing 10 to 12 million tons annually, the average capacity utilization by these mills is around 50 percent. The balance of the production is processed mostly in the *chakkies* (small flour mills).

The Indian bread industry consists of about 1,800 small-scale units, 25 medium-scale units, and two large-scale units. There are also an estimated 75,000 bread producing units in the unorganized sector, mostly located in residential areas of cities and towns. Total bread production in the organized sector is about 1.5 million tons, production of pastries, cakes, etc. is estimated at about 450,000 tons. The per capita bread consumption is estimated at about 1.75 kg per year.

The organized biscuit industry in India, consisting of two large-scale manufacturers, 50 medium-scale units, and 2,500 small-scale units, produces about 1.3 million tons of biscuits. The unorganized sector consists of approximately 30,000 small bakeries across the country. Per capita biscuit consumption in India is estimated at around 2.1 kg per year. When the practice of reserving the biscuit sector for small players ended in 1997/98, some multinational companies such as Sara Lee, Kellogg's, SmithKline Beecham, and Heinz entered it; most of them have meanwhile stopped production due to low profit margins.

The government has announced a support price of rs. 6,400 ($147.90) for MY 2005/06. Although the support price for wheat for MY 2004/25 was rs. 6,300 per ton, the total cost to the government (including marketing fees, commission, transportation, storage, and administrative overhead) was rs. 9,250 ($214) per metric ton. Despite, the increasing support prices, there has been no revision to the government sales price of wheat under the various Public Distribution System (PDS) schemes since July 2002, which remain at rs. 6,100 ($141) per metric ton for the Above Poverty Line (APL) clientele, rs. 4,150 ($96) for the Below Poverty Line (BPL) clientele, and rs. 2,000 ($ 46) for the *Antyodaya Anna Yojana (*AAY or the "poorest-of-the-poor") clientele. Rising procurement and storage costs without any increase in the sales price, are pushing food subsidy spending to record levels, budgeted at rs. 258 billion ($6 billion) in Indian Fiscal Year (IFY) 2004/05 (Apr-Mar).

Trade

India's wheat exports in MY 2005/06 (Apr-Mar) are forecast to decline to around 1.0 million tons from the revised MY 2004/05 estimate of 2.0 million tons. Following the discontinuation of subsidized wheat export sales by the government in August 2003, Indian wheat lost its competitive edge in the world market. Although there are still talks about the government providing a WTO compatible subsidy of rs. 900 ($20.70) per ton, the domestic supply situation does not warrant such a policy. At the support price of rs. 6,400 per ton, the f.o.b. price of wheat sourced from the surplus state of Punjab would work out to roughly $190 per ton. Thus, even if the government provided a subsidy of rs. 900 per ton, Indian wheat may

not be competitive unless the world wheat prices rise. The forecast 1.0 million tons of wheat exports in MY 2005/06 will be mostly to Bangladesh by land route on private account. This wheat is sourced largely from the subsidized PDS wheat leaking into the open market, or it is procured at below support prices from states like Uttar Pradesh, where the government price support operation is not very effective.

The upward revision in the MY 2004/05 exports was necessitated by reported larger exports to Bangladesh via the land route, as reported by the World Food Program, in Bangladesh.

Although the demand for specialty wheat flour for pizzas and burger buns is rising due to high growth in the fast food sector, the high import duty on wheat (50 percent) and wheat flour (30 percent) discourages imports of wheat and flour. A few imported brands of cookies and cakes are visible in some of the large food stores in cities since import restrictions were removed four years ago.

While market access for U.S. wheat was restored in 1999 following the resolution of some SPS issues, the imposition of a 50 percent duty, effective December 1, 1999, made imports infeasible. Although a reduction in the import duty in the near-term looks unlikely, slowing wheat production growth since 2000, combined with increasing domestic demand fueled by population growth and increasing urbanization, may compel the government to reconsider the higher import duty in the future.

Stocks

Government wheat stocks, a major factor in the Indian government's wheat trade decisions, declined further to 10.7 million tons on December 1, 2004, from 14.6 million tons a year ago. Stocks are projected at around 4.5 million tons on April 1, 2005, which is close to the government's desired minimum buffer stock level of 4.0 million tons, and the lowest level since 1998. Government wheat procurement in MY 2005/06 is likely to be more or less at the MY 2004/05 level of 16.8 million tons, just enough to meet the government's PDS requirement. Hence, no build up in government wheat stocks is expected in MY 2005/06. Estimates of privately–held wheat stocks are not available, but such stocks at the end of the marketing year are typically estimated to be about two months worth of consumption. The PS&D data shows only government-held stocks.

Marketing

The Indian wheat-based food industry is modernizing and the fast food industry is growing rapidly, both generating demand for specialty flours for pizzas and burger buns, which would necessitate access to varieties of wheat that India does not grow.

Hefty government export subsidies made India a major exporter of wheat in MY 2002/03 and MY 2003/04, particularly in the South and South East Asian markets, where Indian wheat almost entirely displaced U.S. soft red winter. With the subsidy now gone, India no longer poses much competition to U.S. wheat in these markets.

Policy

After promulgation of the 2002 government order concerning "Removal of Licensing requirements, Stock limits and Movement Restrictions on Special Food Stuff Order, 2002", traders are now free to buy, stock, sell, transport, distribute, or consume any amount of wheat, rice, and other commodities without requiring any permit or license. However, the Agricultural Produce Market Committee (APMC) Act in each Indian state requires that all agricultural products be sold only in government-regulated markets. These markets impose

substantial taxes on buyers, in addition to commissions and fees taken by middlemen, but typically provide little service in such areas as price discovery, grading, or inspection. A key impact of the APMC regulation is that private sector processors, wholesalers, and retailers are unable to purchase commodities directly from farmers, and farmers have been unable to legally enter into contracts with buyers. Furthermore, under this system, farmers have no incentive to upgrade quality and adopt grade standards, because they do not get a premium for quality. Recently, these laws have been relaxed in specific states for specific commodities, and the government has drafted and recommended new legislation to the states that would permit private markets to operate. At least two large companies, one Indian and one multinational, have secured exemptions from the state governments of Madhya Pradesh and Uttar Pradesh, and have started buying wheat and other commodities directly from farmers and trading domestically and internationally.

RICE

Production

Assuming a normal summer monsoon this year, Post forecasts MY 2005/06 rice production, harvested mostly in the fall and early winter of 2005, at 90 million tons from 44.5 million hectares, compared with the revised 2004/05 production estimate of 86 million tons. However, a monsoon failure, as in 2002/03, could bring production down by 10 million tons or more from the forecast level, while extremely favorable weather could take production up to 94 million tons.

Post revises the 2004/05 production upward to 86 million tons (73 million tons *kharif* and 13 million tons *rabi*) from its October 2004 forecast of 83 million tons, following reports of better than expected yields in several states during the 2004 *kharif* (fall and early winter harvested) season and expected larger planting and higher yields from the *rabi* (spring harvested) rice. The government, however, is now carrying a production estimate of 87.8 million tons, assuming a lofty *rabi* production estimate of 14.5 million tons. Estimated *Basmati* (aromatic-long grain) rice production, grown mostly in Haryana, Punjab, and West Uttar Pradesh, is estimated at around 1.4 million tons, marginally below the 2003/04 production due to adverse growing conditions.

Eighty to 90 percent of India's rice crop is seeded during the monsoon period (June – September), and is predominantly rain fed, except in a few states like Punjab and Haryana in the north and Andhra Pradesh and Tamil Nadu in the south, where it is mostly irrigated. For the country as a whole, only about 55 percent of the rice area has assured irrigation. In the States of Punjab and Haryana, yield growth has been stagnant, although the area under rice has been growing in response to assured price and government market intervention. The increase in rice area in these two states is now a cause of concern to the state governments because the continuous rice-wheat rotation has led to a deterioration in soil health and the depletion of ground water, thereby posing a serious risk to the sustainability of agriculture in these states.

According to some government estimates, in order for India to achieve self sufficiency in rice, production needs to reach 120 million tons by 2020 from the present level of around 88 million tons. Hybrid rice, with a yield advantage of 15 to 20 percent over conventional high yielding varieties, is considered to be one of the most feasible and readily available options to increasing production. Area under hybrid rice cultivation in India is estimated to have increased from 10,000 hectares in 1995 to around 500,000 hectares in 2004, mostly in eastern Uttar Pradesh, Bihar, Jharkand, and Chattisgarh. Several hybrid seed varieties with specific consumer-preferred grain quality characteristics are reportedly in the pipeline, which should accelerate hybrid rice adoption by Indian farmers. The Indian Department of

Biotechnology has initiated a Network collaborative program for the development of an "Indian version" of the genetically modified Golden Rice, which has the genes to synthesize and accumulate Beta-carotene (Provitamin A) in its grain. However, approval and commercialization of this variety are still years away.

Consumption

Assuming the 2005/06 forecast is correct, consumption is forecast to increase to 85.0 million metric tons, 1.1 percent higher than the estimated MY 2004/05 consumption. Despite an increase in overall rice and wheat consumption, recent studies on consumer demand and trends in food consumption indicate that per capita wheat and rice consumption has declined in recent years, and that other food groups, including fruits, vegetables, dairy, edible oils, poultry, and eggs are now leading growth in food demand. Faced with large rice stocks two years ago, the government took several measures to boost domestic consumption, including increasing the quantity of subsidized rice/wheat supplied to the "poorest-of-the-poor" from 25 kg per month to 35 kg per month per family and distributing significant quantities of rice and wheat for relief operations. In line with the National Common Minimum Program (NCMP), the political platform of the coalition government, the AAY has been expanded further with effect from August 1, 2004, to cover an additional 5 million BPL families. The government also has an ambitious program to provide rural employment through the food-for-work program. Milled rice is supplied under the PDS at rs. 8,300 ($190.80) per metric ton for the APL clientele and rs. 5,650 ($129) per ton for the BPL clientele.

Support prices for paddy (unmilled rice) for MY 2004/05 are rs. 5,600 ($127.80) for common varieties and rs. 5,900 ($134.70) for Grade A, an increase of rs. 100 per ton over 2003/04. In recent years, most of the government rice procurement from the major northern surplus states is paddy bought at the support price, which the government gets milled at private rice mills. In most other states, the government procures rice through a compulsory levy system, in which millers supply a stipulated percentage (ranging from 50 to 75 percent) of milled rice to the government at an established levy price, which in turn is linked to the support price of paddy. The levy price of rice in Andhra Pradesh is rs. 9,900 ($226) per ton for raw rice (common varieties) and rs. 10,488 ($239) per ton for Grade A. The levy price of par-boiled rice is rs. 9,849 ($224.90) and rs. 10,349 ($236.30) per ton for common and Grade A varieties, respectively. Domestic rice procurement by the government during the MY 2004/05, through January, is ahead of last year this time by over a million tons at around 16.2 million tons. Total MY 2003/04 rice procurement was a record 22.9 million tons.

Trade

Post forecasts CY 2006 rice exports at 2.5 million tons, and projects CY 2005 rice exports at 2.8 million tons. Following reports of large rice exports to Bangladesh in recent months (an estimated 460,000 tons from July through December), CY 2004 exports are revised upward to 3.0 million tons.

The tightening of world supplies and resultant higher prices has generated an increased interest in Indian rice among major importers, particularly for parboiled. At the prevailing F.O.B. price of $250-$255 per metric ton, the Indian low quality (25 percent) white rice is not competitively priced, although some poor quality rice, perhaps leaking into the open market from various PDS schemes, is finding its way to Bangladesh. However, the Indian parboiled rice (5% broken, sortexed) at $290 per metric ton F.O.B. could be competitive. If the world price continues to firm up, Indian exports might rise. Currently, Post expects CY 2005 exports at 2.8 million tons, including 700,000 tons of basmati rice. The major destination for low quality white/parboiled rice will likely be Bangladesh, and for high quality parboiled rice major destinations are Nigeria and South Africa.

Stocks

Despite record government rice procurement in MY 2003/04, government rice stocks fell to 6.1 million tons on October 1, 2004, which is below the government's desired buffer stock level of 6.5 million tons. Higher offtake for domestic distribution and exports decreased stocks. With a likely record, or near record, procurement of rice in MY 2004/05, and the discontinuation of export allocations, the stock situation is expected to improve. The PS&D table includes both government stocks and estimated privately held stocks.

Marketing

India is not an attractive market for U.S. rice, as India is a "price-buyer" when imports are required. Although Indian low-quality white rice exports do not pose a challenge to U.S. rice exports, Indian high quality rice and basmati rice can pose competition to U.S. rice in several markets, such as Europe and the Middle East.

Policy

No change since GAIN report IN4014.

COARSE GRAINS

Production

Assuming a normal monsoon this year, MY 2005/06 coarse grain production is forecast at 33 million tons from 30 million hectares, including 14.5 million tons of corn, 8.0 million tons of sorghum, 9.0 million tons of millet, and 1.5 million tons of barley. Production will largely depend on monsoon rains, as most coarse grain production takes place under non-irrigated conditions in the *kharif* season. Prevailing high corn prices, growing feed demand, and the increasing availability of hybrid seeds should support increased corn planting, particularly in the major surplus states of Andhra Pradesh and Karnataka.

MY 2004/05 coarse grain production is estimated at 32 million tons (13.6 million tons corn, 7.5 million tons sorghum, 9.4 million tons millet, and 1.5 million tons barley), a significant decline from the record 2003/04 production of 37.8 million tons, which included a record corn crop of 14.7 million tons. The decline was mainly due to the inadequate monsoon rains in major producing states.

Among coarse grains, only corn has shown positive growth in acreage and production over recent years, thanks to increased irrigation, better seeds, and the government's Accelerated Maize Development Program. The rapid growth in the poultry sector also provided an impetus for increased corn production. In the case of sorghum and millet, used mostly for food in India, however, the increased availability of wheat and rice has resulted in lower demand and therefore lower production.

Consumption

At the forecast level of production, MY 2004/05 coarse grain consumption is expected to be marginally higher than the low MY 2003/04 level. Food use still accounts for a major share of coarse grain consumption, particularly in the case of sorghum and millet, whose consumption is localized; sorghum mostly in Maharashtra and Karnataka, and millet in Rajasthan, Gujarat, and Maharashtra. Consumer expenditure surveys have shown that coarse grain consumption is declining, and even poor people have changed their food habits

toward wheat and rice. The increased availability of wheat and rice through the PDS and other government schemes is also a reason for the change in people's dietary habits. In the case of corn, roughly 50 percent of the consumption (about 6.5 million tons) goes for feed use, primarily poultry feed. The poultry industry is still expanding and spurring feed demand for corn. About one million tons of corn is used by the starch industry. The high tannin content in Indian sorghum restricts its use in poultry rations, while its use in the production of alcohol and starch is reportedly increasing. Barley is mainly used as a food grain, although some better quality barley is used in malting.

Trade

Corn exports in MY 2005/06 are forecast at 200,000 tons, mostly to neighboring Bangladesh and Sri Lanka. Exports in MY 2004/05 are estimated at 200,000 tons, significantly below the record exports of 750,000 tons in MY 2003/04. High domestic prices and a steep fall in world prices have made Indian corn uncompetitive in the world market. MY 2003/04 corn exports were mainly to Bangladesh, Sri Lanka, the Middle East, and South East Asian countries. India's ability to export in relatively small quantities continues to be a selling factor. Exports of other coarse grains are negligible.

Although the prevailing low corn prices in the United States should make U.S. corn imports attractive to the Indian poultry and starch industries, the 15 percent in-quota import duty makes imports infeasible. Thus, corn imports look unlikely in the near future, unless the import duty is abolished, or lowered.

Marketing

The rapid growth of the poultry sector, combined with slow growth in corn production, will create continued pressure from end-users for access to cheaper, imported corn. The main stumbling block is the 15 percent in-quota duty and the poor administration of the tariff rate quota (TRQ). The issue of bioengineered corn would also have to be addressed.

Policy

On June 12, 2000, the government established a global TRQ for corn imports, under which 500,000 tons of corn can be imported annually, subject to an in-quota tariff of 15 percent, and imports above that level would face 50 percent duty. The Exim Facilitation Committee in the office of the Director General of Foreign Trade currently administers the TRQ. Per a notification issued on May 12, 2004, eligible entities for the allocation of the corn TRQ were various government parastatals like the National Agricultural Cooperative Marketing Federation and the State Trading Corporation of India, which will import on behalf of end users (feed mills and starch mills). The time span provided for applying for the TRQ license was only until June 30, 2004, and imports must be completed by March 31, 2005, making implementation of TRQ highly restrictive.

PULSES

Production

India's MY 2005/06 (Apr/Mar) pulse production is forecast at 14.0 million tons, 9 percent below the MY 2004/05 record production of 15.2 million tons. Erratic monsoon rains last summer, and inadequate soil moisture for the planting of the *rabi* season pulse crops in the major producing state of Rajasthan, were factors responsible for the lower production. The forecast production includes 6.0 million tons of chickpeas, 1 million tons of lentils, 800,000

tons of dried peas, and 6.2 million tons of various other beans (pigeon peas, *urd* or black matpe, *mung* beans, and other minor pulses).

India is the world's largest producer of pulses, which are an integral part of the Indian diet as they provide much-needed protein. Pulses are grown in both the *kharif* and *rabi* seasons, with 60 percent produced in the *rabi*. Most are grown under non-irrigated conditions, and depend largely on monsoon and winter rains for growth. Limited varietal improvements, low resilience to moisture stress and pest infestation, and a lack of government support programs have contributed to low production.

Consumption

Due to anticipated lower pulse production in MY 2005/06, pulse consumption is also expected to decline, although production decline would be marginally offset by larger imports. Despite the fact that India imports significant quantities of pulses, India's per capita pulse consumption is shrinking, as households substitute between pulses and other food groups based on relative prices and budget constraints.

Trade

Pulse imports are forecast at 2 million tons in MY 2005/06, up from an estimated 1.5 million tons in 2004/05 and actual imports of 1.7 million tons in 2003/04. MY 2003/04 imports included 700,000 tons of dried peas, 260,000 tons of chickpeas, 206,000 tons of *mung* beans, 41,000 tons of kidney beans, 8,600 tons of red beans, 38,000 tons of lentils, and 470,000 tons of various other pulses and dried legumes. Major suppliers were Myanmar, Canada, Australia, and France. The U.S. share was 4,000 tons (mostly dried peas and chickpeas), or a mere 0.2 percent, on account of uncompetitive prices. U.S. dry peas are roughly $100 higher per ton than Canadian peas.

Marketing

India's "price buyers" of pulses are unwilling to pay a significant premium for admittedly higher U.S. quality, especially when lower-cost pulses are plentiful from other countries. Most U.S. type beans (navy beans, black beans, pintos, and lima beans), with the exception of green and yellow peas and chickpeas, are relatively unknown in India. Keys to improving the U.S. position in the Indian pulse market include expanding U.S. supplies of peas and chickpeas, through increased planting and increasing price competitiveness.

Policy

India's Plant Quarantine (Regulation of Import into India) Order, 2003 (GAIN IN3126), effective January 1, 2004, made pulse imports from all origins subject to fumigation by methyl bromide at the port of loading to protect domestic production from stem and bulb nematode, pea cyst nematode, and bruchids. This posed a serious problem for exports of U.S. pulses to India, as Phosphine is the major fumigant used in the United States. Following representations made by the Foreign Agricultural Service and the Animal and Plant Health Inspection Service, the GOI gave permission to import U.S. pulses subject to fumigation by methyl bromide at the port of arrival in India, valued for consignments shipped from the United States up to June 30, 2005. The import duty on pulses is ten percent effective March 1, 2002.

Note: For a detailed report on Indian pulses, refer to:
www.ers.usda.gov/publications/WRS03/may03/wrs0301/wrs0301.pdf

SECTION II: STATISTICAL TABLES

Table 1: Commodity, Wheat, PSD

PSD Table							
Country	India						
Commodity	Wheat				(1000 HA) (1000 MT)		
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		04/2003		04/2004		04/2005	MM/YYYY
Area Harvested	25,900	24,860	27,300	26,620	-	26,300	(1000 HA)
Beginning Stocks	15,700	15,700	6,900	6,900	5,500	4,500	(1000 MT)
Production	65,100	65,100	72,060	72,060	-	74,000	(1000 MT)
TOTAL Mkt. Yr. Imports	8	8	20	10	-	10	(1000 MT)
Jul-Jun Imports	8	8	20	10	-	10	(1000 MT)
Jul-Jun Import U.S.	-	-	-	-	-	-	(1000 MT)
TOTAL SUPPLY	80,808	80,808	78,980	78,970	5,500	78,510	(1000 MT)
TOTAL Mkt. Yr. Exports	5,650	6,700	1,500	2,400	-	1,000	(1000 MT)
Jul-Jun Exports	5,000	6,400	1,000	2,000	-	1,000	(1000 MT)
Feed Dom. Consumption	600	600	500	500	-	500	(1000 MT)
TOTAL Dom. Consumption	68,258	67,208	71,980	72,070	-	73,000	(1000 MT)
Ending Stocks	6,900	6,900	5,500	4,500	-	4,510	(1000 MT)
TOTAL DISTRIBUTION	80,808	80,808	78,980	78,970	-	78,510	(1000 MT)

Table 2: Commodity, Wheat, Export Trade Matrix

Export Trade Matrix			
Country	India		
Commodity	Wheat		
Time Period	Jul-Jun	Units:	Jul-Feb
Exports for:	2003		**2004**
U.S.	0	U.S.	
Others		Others	
Bangladesh	1,380,000	Bangladesh	800,000
UAE	900,000	Middle East	330,000
Indonesia	820,000	Philippines	105,000
Sri Lanka	460,000	Sudan	55,000
Yemen	420,000	Taiwan	40,000
Tanzania	270,000	Malaysia	36,000
Sudan	200,000	Vietnam	18,000
Vietnam	170,000	Sri Lanka	18,000
Korea	250,000		
Malaysia	170,000		
Total for Others	5,040,000		1,402,000
Others not Listed	1,360,000		100,000
Grand Total	6,400,000		1,502,000

Source: Private Shipping Data and Bangladesh Import Data

Table 3: Commodity, Wheat, Prices Table

Prices Table			
Country	India		
Commodity	Wheat		
Prices in	Rupees	per uom	metric ton
Year	2003	2004	% Change
Jan	7,800	7,700	-1%
Feb	7,550	7,750	3%
Mar	7,670	7,600	-1%
Apr	7,000	7,350	5%
May	6,800	7,670	13%
Jun	6,850	7,600	11%
Jul	6,850	6,800	-1%
Aug	6,850	6,700	-2%
Sep	6,550	6,650	2%
Oct	6,970	7,000	0%
Nov	6,950	7,750	12%
Dec	7,000	7,850	12%
Exchange Rate	rs. 43.78	Local Currency/US $	
Date of Quote	15-Feb-05	MM/DD/YYYY	

Source: Ministry of Consumer Affairs, Food, and Public Distribution, GOI

Table 4: Commodity, Rice Milled, PSD

PSD Table							
Country	**India**						
Commodity	**Rice, Milled**				(1000 HA) (1000 MT)		
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		10/2003		10/2004		10/2005	MM/YYYY
Area Harvested	44,000	42,400	42,500	42,300	-	44,500	(1000 HA)
Beginning Stocks	11,000	11,000	10,900	10,900	8,900	10,100	(1000 MT)
Milled Production	87,000	87,000	83,000	86,000	-	90,000	(1000 MT)
Rough Production	130,513	130,513	124,512	129,013	-	135,014	(1000 MT)
MILLING RATE (.9999)	6,666	6,666	6,666	6,666	-	6,666	(1000 MT)
TOTAL Imports	-	-	-	-	-	-	(1000 MT)
Jan-Dec Imports	-	-	-	-	-	-	(1000 MT)
Jan-Dec Import U.S.	-	-	-	-	-	-	(1000 MT)
TOTAL SUPPLY	**98,000**	**98,000**	**93,900**	**96,900**	**8,900**	**100,100**	(1000 MT)
TOTAL Exports	2,750	3,000	2,600	2,800	-	2,500	(1000 MT)
Jan-Dec Exports	2,800	3,000	3,000	2,800	-	2,500	(1000 MT)
TOTAL Dom. Consumption	84,350	84,100	82,400	84,000	-	85,000	(1000 MT)
Ending Stocks	10,900	10,900	8,900	10,100	-	12,600	(1000 MT)
TOTAL DISTRIBUTION	**98,000**	**98,000**	**93,900**	**96,900**	**-**	**100,100**	(1000 MT)

Table 5: Commodity, Rice Milled, Export Trade Matrix

Export Trade Matrix			
Country	India		
Commodity	Rice, Milled		
Time Period	Jan-Dec	Units:	Metric ton
Exports for:	2003		**2004**
U.S.	36000	U.S.	27000
Others		Others	
Bangladesh	1,485,000	Saudi Arabia	800,000
Saudi Arabia	826,000	Bangladesh	650,000
Nigeria	606,000	South Africa	280,000
South Africa	247,400	Nigeria	230,000
West Africa	228,100	UAE	120,000
Mozambique	68,600	UK	85,000
Iran	92,000	Kuwait	80,000
UAE	90,000	Somalia	50,000
Kuwait	48,000	Yemen	40,000
Somalia	46,000	Djibouti	25,000
Total for Others	3,737,100		2,360,000
Others not Listed	647,900		613,000
Grand Total	4,421,000		3,000,000

Source: Government statistics, private shipping data, and Bangladesh import statistics

Table 6: Commodity, Rice Milled, Prices Table

Prices Table			
Country	India		
Commodity	Rice, Milled		
Prices in	Rupees	per uom	metric ton
Year	2003	2004	% Change
Jan	9,800	10,900	11%
Feb	9,300	11,250	21%
Mar	9,650	11,200	16%
Apr	9,500	11,100	17%
May	9,400	11,150	19%
Jun	9,250	11,000	19%
Jul	9,750	10,800	11%
Aug	9,500	10,900	15%
Sep	9,250	10,300	11%
Oct	9,300	10,250	10%
Nov	9,250	10,150	10%
Dec	9,150	10,005	9%
Exchange Rate	rs. 43.78	Local Currency/US $	
Date of Quote	15-Feb-05	MM/DD/YYYY	

Source: Ministry of Consumer Affairs, Food, and Public Distribution, GOI

Table 7: Commodity, Corn, PSD

PSD Table							
Country	**India**						
Commodity	**Corn**				(1000 HA) (1000 MT)		
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		11/2003		11/2004		11/2005	MM/YYYY
Area Harvested	7,000	7,420	6,800	7,000	-	7,400	(1000 HA)
Beginning Stocks	213	213	483	483	333	333	(1000 MT)
Production	14,720	14,720	14,000	13,600	-	14,500	(1000 MT)
TOTAL Mkt. Yr. Imports	-	-	-	-	-	-	(1000 MT)
Oct-Sep Imports	-	-	-	-	-	-	(1000 MT)
Oct-Sep Import U.S.	-	-	-	-	-	-	(1000 MT)
TOTAL SUPPLY	**14,933**	**14,933**	**14,483**	**14,083**	**333**	**14,833**	(1000 MT)
TOTAL Mkt. Yr. Exports	750	750	150	200	-	200	(1000 MT)
Oct-Sep Exports	750	750	150	200	-	200	(1000 MT)
Feed Dom. Consumption	6,000	6,000	6,400	6,400	-	6,600	(1000 MT)
TOTAL Dom. Consumption	13,700	13,700	14,000	13,550	-	14,000	(1000 MT)
Ending Stocks	483	483	333	333	-	633	(1000 MT)
TOTAL DISTRIBUTION	**14,933**	**14,933**	**14,483**	**14,083**	**-**	**14,833**	(1000 MT)

Table 8: Commodity, Sorghum, PSD

PSD Table							
Country	**India**						
Commodity	**Sorghum**				(1000 HA) (1000 MT)		
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		11/2003		11/2004		11/2005	MM/YYYY
Area Harvested	9,500	9,490	9,200	9,400	-	9,400	(1000 HA)
Beginning Stocks	123	123	73	73	73	123	(1000 MT)
Production	7,330	7,330	6,500	7,530	-	8,000	(1000 MT)
TOTAL Mkt. Yr. Imports	-	-	-	-	-	-	(1000 MT)
Oct-Sep Imports	-	-	-	-	-	-	(1000 MT)
Oct-Sep Import U.S.	-	-	-	-	-	-	(1000 MT)
TOTAL SUPPLY	**7,453**	**7,453**	**6,573**	**7,603**	**73**	**8,123**	(1000 MT)
TOTAL Mkt. Yr. Exports	30	30	-	30	-	30	(1000 MT)
Oct-Sep Exports	30	30	-	30	-	30	(1000 MT)
Feed Dom. Consumption	1,000	1,000	800	1,100	-	1,200	(1000 MT)
TOTAL Dom. Consumption	7,350	7,350	6,500	7,450	-	7,900	(1000 MT)
Ending Stocks	73	73	73	123	-	193	(1000 MT)
TOTAL DISTRIBUTION	**7,453**	**7,453**	**6,573**	**7,603**	**-**	**8,123**	(1000 MT)

Table 9: Commodity, Millet, PSD

PSD Table							
Country	**India**						
Commodity	**Millet**				(1000 HA) (1000 MT)		
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		11/2003		11/2004		11/2005	MM/YYYY
Area Harvested	12,000	13,100	9,400	9,800	-	12,000	(1000 HA)
Beginning Stocks	300	300	600	600	200	190	(1000 MT)
Production	13,800	14,350	8,000	9,400	-	9,000	(1000 MT)
TOTAL Mkt. Yr. Imports	-	-	-	-	-	-	(1000 MT)
Oct-Sep Imports	-	-	-	-	-	-	(1000 MT)
Oct-Sep Import U.S.	-	-	-	-	-	-	(1000 MT)
TOTAL SUPPLY	**14,100**	**14,650**	**8,600**	**10,000**	**200**	**9,190**	(1000 MT)
TOTAL Mkt. Yr. Exports	-	-	-	-	-	-	(1000 MT)
Oct-Sep Exports	-	-	-	-	-	-	(1000 MT)
Feed Dom. Consumption	900	900	900	800	-	800	(1000 MT)
TOTAL Dom. Consumption	13,500	14,050	8,400	9,810	-	9,100	(1000 MT)
Ending Stocks	600	600	200	190	-	90	(1000 MT)
TOTAL DISTRIBUTION	**14,100**	**14,650**	**8,600**	**10,000**	**-**	**9,190**	(1000 MT)

Table 10: Commodity, Barley, PSD

PSD Table							
Country	**India**						
Commodity	**Barley**				(1000 HA) (1000 MT)		
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		04/2003		04/2004		04/2005	MM/YYYY
Area Harvested	750	750	750	750	-	755	(1000 HA)
Beginning Stocks	24	24	34	34	4	4	(1000 MT)
Production	1,410	1,410	1,370	1,370	-	1,460	(1000 MT)
TOTAL Mkt. Yr. Imports	-	-	-	-	-	-	(1000 MT)
Oct-Sep Imports	-	-	-	-	-	-	(1000 MT)
Oct-Sep Import U.S.	-	-	-	-	-	-	(1000 MT)
TOTAL SUPPLY	**1,434**	**1,434**	**1,404**	**1,404**	**4**	**1,464**	(1000 MT)
TOTAL Mkt. Yr. Exports	-	-	-	-	-	-	(1000 MT)
Oct-Sep Exports	-	-	-	-	-	-	(1000 MT)
Feed Dom. Consumption	100	100	100	100	-	150	(1000 MT)
TOTAL Dom. Consumption	1,400	1,400	1,400	1,400	-	1,434	(1000 MT)
Ending Stocks	34	34	4	4	-	30	(1000 MT)
TOTAL DISTRIBUTION	**1,434**	**1,434**	**1,404**	**1,404**	**-**	**1,464**	(1000 MT)

Table 11: Commodity, Garbanzos, PSD

PSD Table							
Country	**India**						
Commodity	**Garbanzos**				(1000 HA) (1000 MT)		
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		04/2003		04/2004		04/2005	MM/YYYY
Area Harvested	5,800	5,670	7,700	7,360	-	7,200	(1000 HA)
Beginning Stocks	-	-	-	-	-	-	(1000 MT)
Production	4,440	4,130	7,000	5,770	-	6,000	(1000 MT)
TOTAL Mkt. Yr. Imports	260	260	160	150	-	200	(1000 MT)
Jul-Jun Imports	260	260	160	150	-	200	(1000 MT)
Jul-Jun Import U.S.	2	1	2	2	-	2	(1000 MT)
TOTAL SUPPLY	**4,700**	**4,390**	**7,160**	**5,920**	**-**	**6,200**	(1000 MT)
TOTAL Mkt. Yr. Exports	5	5	10	5	-	5	(1000 MT)
Jul-Jun Exports	5	5	10	5	-	5	(1000 MT)
Feed Dom. Consumption	-	-	-	-	-	-	(1000 MT)
TOTAL Dom. Consumption	4,695	4,385	7,150	5,915	-	6,195	(1000 MT)
Ending Stocks	-	-	-	-	-	-	(1000 MT)
TOTAL DISTRIBUTION	**4,700**	**4,390**	**7,160**	**5,920**	**-**	**6,200**	(1000 MT)

Table 12: Commodity, Peas, PSD

PSD Table							
Country	**India**						
Commodity	**Peas**				(1000 HA) (1000 MT)		
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		04/2003		04/2004		04/2005	MM/YYYY
Area Harvested	580	580	580	590	-	550	(1000 HA)
Beginning Stocks	-	-	-	-	-	-	(1000 MT)
Production	800	800	800	900	-	780	(1000 MT)
TOTAL Mkt. Yr. Imports	750	700	700	650	-	750	(1000 MT)
Jul-Jun Imports	750	700	700	650	-	700	(1000 MT)
Jul-Jun Import U.S.	5	3	5	5	-	5	(1000 MT)
TOTAL SUPPLY	**1,550**	**1,500**	**1,500**	**1,550**	**-**	**1,530**	(1000 MT)
TOTAL Mkt. Yr. Exports	-	-	-	-	-	-	(1000 MT)
Jul-Jun Exports	-	-	-	-	-	-	(1000 MT)
Feed Dom. Consumption	-	-	-	-	-	-	(1000 MT)
TOTAL Dom. Consumption	1,550	1,500	1,500	1,550	-	1,530	(1000 MT)
Ending Stocks	-	-	-	-	-	-	(1000 MT)
TOTAL DISTRIBUTION	**1,550**	**1,500**	**1,500**	**1,550**	**-**	**1,530**	(1000 MT)

Table 13: Commodity, Lentils, PSD

PSD Table							
Country	**India**						
Commodity	**Lentils**				(1000 HA) (1000 MT)		
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		04/2003		04/2004		04/2005	MM/YYYY
Area Harvested	1,390	1,320	1,450	1,450	-	1,400	(1000 HA)
Beginning Stocks	-	-	-	-	-	-	(1000 MT)
Production	950	880	1,100	1,100	-	1,000	(1000 MT)
TOTAL Mkt. Yr. Imports	50	38	40	40	-	40	(1000 MT)
Jul-Jun Imports	50	38	40	40	-	40	(1000 MT)
Jul-Jun Import U.S.	-	-	-	-	-	-	(1000 MT)
TOTAL SUPPLY	**1,000**	**918**	**1,140**	**1,140**	**-**	**1,040**	(1000 MT)
TOTAL Mkt. Yr. Exports	110	110	100	100	-	90	(1000 MT)
Jul-Jun Exports	110	110	100	100	-	90	(1000 MT)
Feed Dom. Consumption	-	-	-	-	-	-	(1000 MT)
TOTAL Dom. Consumption	890	808	1,040	1,040	-	950	(1000 MT)
Ending Stocks	-	-	-	-	-	-	(1000 MT)
TOTAL DISTRIBUTION	**1,000**	**918**	**1,140**	**1,140**	**-**	**1,040**	(1000 MT)

Table 14: Commodity, Beans, PSD

PSD Table							
Country	**India**						
Commodity	**Beans**				(1000 HA) (1000 MT)		
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		04/2003		04/2004		04/2005	MM/YYYY
Area Harvested	13,000	12,480	13,800	15,050	-	14,000	(1000 HA)
Beginning Stocks	-	-	-	-	-	-	(1000 MT)
Production	5,100	5,330	6,100	7,470	-	6,200	(1000 MT)
TOTAL Mkt. Yr. Imports	740	700	700	660	-	1,000	(1000 MT)
Jul-Jun Imports	740	700	700	660	-	-	(1000 MT)
Jul-Jun Import U.S.	3	2	2	-	-	-	(1000 MT)
TOTAL SUPPLY	**5,840**	**6,030**	**6,800**	**8,130**	**-**	**7,200**	(1000 MT)
TOTAL Mkt. Yr. Exports	30	30	20	20	-	20	(1000 MT)
Jul-Jun Exports	30	30	20	20	-	20	(1000 MT)
Feed Dom. Consumption	-	-	-	-	-	-	(1000 MT)
TOTAL Dom. Consumption	5,810	6,000	6,780	8,110	-	7,180	(1000 MT)
Ending Stocks	-	-	-	-	-	-	(1000 MT)
TOTAL DISTRIBUTION	**5,840**	**6,030**	**6,800**	**8,130**	**-**	**7,200**	(1000 MT)