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Report Highlights:
A lower wheat production forecast for 2008, insignificant improvement in government-held wheat stocks and lower rice stocks with the government should prompt the government to look for additional wheat imports in MY 2008/09. The current forecast for MY2008/09 imports is 2 million tons. Government imports are meant to keep domestic wheat prices under control, and rebuild strategic grain stocks. With no significant improvement in rice production and procurement and with domestic rice prices running high, the government is unlikely to relax and perhaps even further tighten the current restrictions on rice exports, resulting in a significant decline in India's rice exports in CY 2008 and CY 2009, forecast at 2.5 million tons compared to 5 million tons in CY 2007. India's relatively lower corn prices vis-à-vis other major exporters are helping exports, estimated at 700,000 tons in MY 2007/08 and forecast at one million tons in MY 2008/09. Static pulse (peas, beans, and lentils) production combined with increasing consumption should necessitate continued large scale imports of pulses, estimated at 2.8 million tons in MY 2007/08.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
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New Delhi [IN1]
[IN]

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WHEAT

Table 1: Commodity, Wheat, PSD

PSD Table									
Country	India								
Commodity	Wheat						(1000 HA) (1000 MT) (MT/HA)		
	2006	Revised		2007	Estimate		2008	Forecast	
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New
Market Year Begin		04/2006	04/2006		04/2007	04/2007		04/2008	04/2008
Area Harvested	26400	26400	26400	28000	28000	28200	0	0	27700
Beginning Stocks	2000	2000	2000	4500	4500	4500	5490	5490	5500
Production	69350	69350	69350	74890	74890	75810	0	0	74500
MY Imports	6708	6708	6080	2000	2000	2000	0	0	2000
TY Imports	6708	6708	6200	2000	2000	1800	0	0	2000
TY Imp. from U.S.	0	0	0	0	0	0	0	0	0
Total Supply	**78058**	**78058**	**77430**	**81390**	**81390**	**82310**	**5490**	**5490**	**82000**
MY Exports	200	200	200	50	50	50	0	0	50
TY Exports	200	200	200	50	50	50	0	0	50
Feed Consumption	300	300	300	200	200	200	0	0	100
FSI Consumption	73058	73058	72430	75650	75650	76560	0	0	77850
Total Consumption	73358	73358	72730	75850	75850	76760	0	0	77950
Ending Stocks	4500	4500	4500	5490	5490	5500	0	0	4000
Total Distribution	**78058**	**78058**	**77430**	**81390**	**81390**	**82310**	**0**	**0**	**82000**
Yield	2.626894	2.626894	2.626894	2.674643	2.674643	2.688298	0	0	2.689531

Production

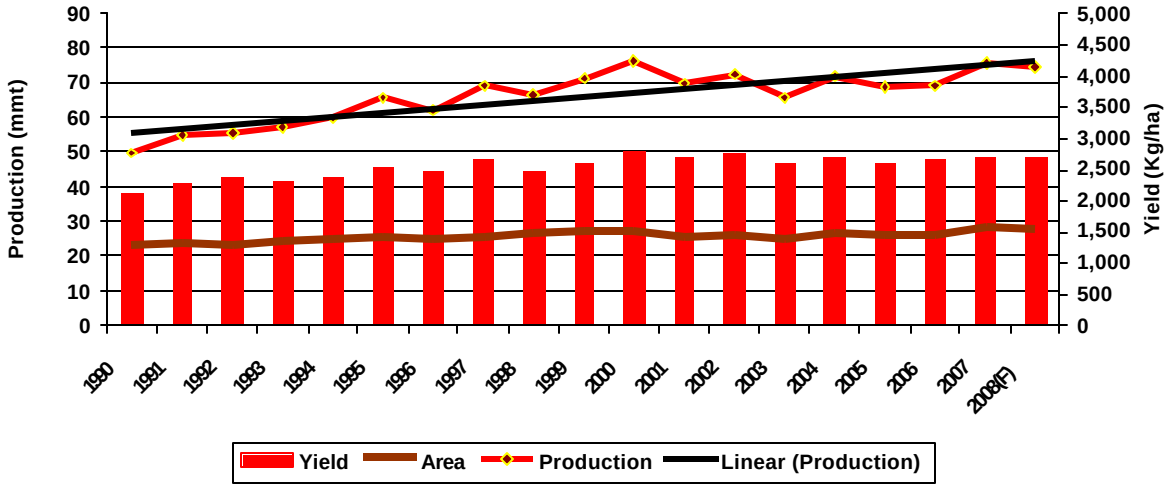
After reaching a near record production (revised official estimate) of 75.8 million tons in 2007 (record production was 76.4 million tons in 2000), India's 2008 wheat harvest this spring is forecast to decline to 74.5 million tons due to a 500,000 hectare decline in planted area. Most of the decline is likely in Madhya Pradesh, Uttar Pradesh, Rajasthan, and Bihar, where yields are typically lower, in response to poor soil moisture conditions and higher temperatures at planting time. Wheat planting in the sugarcane belt of Uttar Pradesh, the largest wheat growing state, was delayed due to late harvesting of sugarcane, as sugar mills delayed cane purchases. However, in the mostly irrigated wheat growing states of Punjab and Haryana, wheat planting was reported higher in response to a significant hike in the minimum support price announced by the government well before the planting season.

Approximately 88 percent of India's wheat-planted area has irrigation facilities, confined mostly in the states of Punjab, Haryana and Uttar Pradesh. Winter rains and cool temperatures are critical for realizing higher yields in the other producing states. Growing conditions have so far been generally favorable, characterized by prolonged cool temperatures, which should partially offset production loss due to the decline in planted area. However, winter rains in major non-irrigated wheat growing states were lacking. The quality of the 2008 crop will largely depend on weather conditions during February through harvest.

An early or sudden rise in temperature or rains and hail at harvest time are factors which could affect both quality and quantity.

Indian wheat is largely a soft/medium hard, medium protein, white bread wheat, somewhat similar to U.S. hard white wheat. Wheat grown in central and western India is typically hard, with high protein and high gluten strength. India also produces around 1.5 million tons of durum wheat, mostly in the state of Madhya Pradesh, which, however, is not marketed separately due to segregation problems at the market yard.

Fig. 1 Wheat: Area, Production, and Yield



After reaching a record production of 76.4 million tons in 2000, wheat production has been fluctuating between 66 and 75.5 million tons, below the trend line in most years (See Fig. 1). Production growth has decelerated from 3.67 percent during 1985/86 through 1995/96 to 0.70 percent during 1995/96 through 2006/07, significantly below population growth of around 1.9 percent. Although potential exists to increase wheat yields in most states, realizing that potential is hampered by lack of irrigation, poor seed replacement rate, and low input use. The existing wheat varieties, released nearly a decade ago are showing signs of fatigue. Furthermore, wheat production has become more vulnerable to a changing climatic conditions characterized by an earlier than normal spurt in surface temperatures coinciding with the grain filling stage.

As the growth momentum of wheat production following the Green Revolution was the cornerstone of India's food security, stagnation in production in recent years is a matter of serious concern to the government. Recognizing this fact, the GOI recently launched a National Food Security Mission (NFSM) (http://agricoop.nic.in/NFSM/NFSM.pdf), which aims to increase the country's wheat, rice, and pulse production by 8, 10 and 2 million tons respectively by the end of the 11th Five Year Plan (2011/12) to ensure food security. Since a further significant growth in wheat area is unlikely due to increased competition from competing crops such as oilseeds and pulses (which are also in short supply), the approach of the NFSM is to bridge the yield gap in these crops through dissemination of improved technologies and farm management practices. However, the success of such programs will largely depend on effective implementation by states as agriculture is a state subject in India. Typically, there is wide variation in the priorities assigned by states to agriculture and there is lack of synergy between the central government initiatives and the state initiatives.

Although the Indian government realizes that biotechnology can be a valuable tool in meeting growing agricultural demands, at present there is little focus on applying biotechnology to wheat.

Consumption

Wheat consumption in MY 2008/09 is forecast at 78 million tons compared with 76.6 million tons in MY 2007/08. Contrary to market expectations, wheat prices remained more or less stable during the entire marketing year, albeit marginally higher level in most months, mainly due to ample open market availability following a near-record harvest, limits on private holding of stocks, and export restrictions. However, distribution of wheat through the public distribution system is estimated to have remained unchanged from the MY 2006/07 low of 12 million tons as the government took measures to prevent the leakage of highly subsidized wheat into the open market. Although consumer expenditure surveys by the GOI's National Sample Survey Organization (NSSO) show a declining trend in India's per-capita cereal consumption, including wheat, and an increasing trend in the consumption of high value food products such as vegetables, fruits, and milk, per-capita wheat consumption in urban areas has been rising faster than in rural areas since 1993/94.

Increasing urbanization, combined with a change in diet in favor of wheat and wheat products is likely to result in increased demand for wheat in the coming years. Wheat consumption in the traditionally rice-consuming southern Indian states is also growing rapidly. Furthermore, the National Rural Employment Guarantee Program (http://nrega.nic.in/Nrega_guidelinesEng.pdf), the government's flagship program launched in 2006, which has now been expanded to cover 330 districts and likely to cover the entire country in 2008, has resulted in increased purchasing power in rural households, leading to increased demand for staple grains such as wheat and rice.

Most wheat consumption is in the form of homemade *chapattis* or *rotis* (unleavened flat bread), using custom milled *atta* (whole meal flour). Use of branded and packaged *atta,* marketed by large companies, is increasing in cities. With the organized retail sector booming with the entry of several large Indian conglomerates, more special purpose blends and brands are likely to emerge. There are around 1,000 medium-to-large flourmills in India, with a milling capacity of around 24 million tons, which manufacture mostly *maida* (flour), semolina, and residual flour to cater to institutional demand. Processing 10 to 12 million tons annually, the average capacity utilization by these mills is only around 50 percent. The balance of production, after retention for seed/feed by farmers, is custom milled mostly in the *chakkies* (small flour mills). Typically whole wheat is distributed through the PDS, although the government is now considering distributing at least part of the supplies in flour form to prevent the leakage of the highly subsidized PDS wheat in to the open market. The PDS clientele takes this wheat, after cleaning, to a *chakkie* for custom milling. Consumer preference is mostly for white wheat as it gives a better look and texture to the home-made chapattis. For this reason, the imported red wheat supplied through the PDS in various states since last year is unpopular with consumers. Although the demand for specialty wheat flour for pizzas, burgers, and bakery products is rising, most manufacturers currently source their requirements domestically, although the quality is not up to the mark.

The government has announced a support price for wheat of Rs. 10,000 ($253) per ton for MY 2008/09, compared with Rs. 8,500 per ton in MY 2007/08. The prevailing market prices are 10 to 30 percent above the support price for milling quality wheat ranging from around Rs. 11,000 ($279) per ton in Delhi to Rs. 12,500 ($316) per ton in south India. Although prices are expected to weaken following the harvest of the new wheat crop in April, it is unlikely that prices will fall below the support level in most states. Furthermore, there is likely to be increased direct purchases by flour millers and traders, which should adversely

affect government wheat procurement in MY 2008/09 as in the previous two years, when procurement dropped to 11.1 million tons last year and 9.2 million tons in 2006. It is likely that the government, in order to maximize procurement, will announce a bonus over and above the support price and will continue to impose restrictions on private trade participation in wheat trade. This would result in reduced availability of wheat in the open market, resulting in higher prices during the lean supply period of October to February.

Despite the increasing support prices, there have been no revisions to the government sales price of wheat under various PDS programs since July 2002. Government wheat sales prices are Rs. 6,100 ($154.4) per to for the Above Poverty Line (APL) clientele, Rs. 4,150 ($105.1) for the Below Poverty Line (BPL) clientele, and Rs. 2,000 ($50.6) per ton for the poorest-of-the-poor (*Antyodaya Anna Yojana*) clientele against the government's cost price of Rs. 12,326 ($312) per ton in 2006/07. Rising procurement costs, without an increase in the sales prices, are pushing up food subsidy spending, budgeted at Rs. 257 billion ($6.5 billion) in Indian Fiscal Year (IFY) 2007/08 (Apr-Mar). The actual food subsidy in 2007/08, however, is likely to exceed the budgeted level because of the higher cost of both domestic and imported wheat. The following table shows the trend in the support price and the PDS issue price of wheat and the government food subsidy over the past several years:

Table 2: Government Support Price and Issue Price of Wheat

Marketing Year (Apr – Mar)	Support Price Rs. per ton	PDS Issue Price Rs. per ton			Food Subsidy Rs. Billion
		APL	BPL	AAY	
2001/02	6,100	8,300	4,150	2,000	175.0
2002/03	6,200	6,100	4,150	2,000	241.8
2003/04	6,300	1/ 6,100	4,150	2,000	251.8
2004/05	6,300	6,100	4,150	2,000	257.5
2005/06	6,400	6,100	4,150	2,000	230.7
2006/07	6,500	6,100	4,150	2,000	238.3
2007/08	8,500	6,100	4,150	2,000	2/ 257.0
2008/09	10,000				

1/ Rs. 5,100 during April 1, 2002 June 30, 2002
2/ Budgeted. Actual expected to be higher.
Note: Current exchange rate is Rs. 39.50 = 1 US$
APL = Above Poverty Line; BPL = Below Poverty Line
AAY = Antyodaya Anna Yojana (Poorest of the Poor)

In order to conserve wheat stocks the government has curtailed allocation of wheat to the PDS and other welfare programs. This has resulted in a significant reduction in wheat distribution from government stocks to around 12 million tons in MY 2006/07 and MY 2007/08, from 17.2 million tons in MY 2005/06.

Trade

Post currently forecasts MY 2008/09 imports at 2 million tons as the overall wheat supply situation, and wheat availability with the government in particular, is likely to come under pressure due to low carry-over stocks and likely lower production and procurement. Lower rice stocks held by the government should also support wheat imports, as in the past the government was supplying more rice through the PDS to offset the reduced allocation of wheat. Furthermore, with the national election due in early 2009, the government would like

to see prices of essential food items such as wheat, rice, and pulses to remain low by increasing domestic availability. The government is also interested in augmenting the strategic food reserves, which have declined sharply in recent years. The need to import wheat would become more imperative should the 2008 summer monsoon (June-September) turn out to be below normal. Private wheat imports will largely depend on the parity between domestic wheat prices and international prices. Although the zero import duty regime on private wheat imports ended effective January 1, 2008, it is likely that the government will continue to permit duty-free or lower duty imports of wheat once the peak wheat marketing season is over in May. In order to contain the price rise in wheat and wheat products, the government on December 26, 2007, permitted duty-free imports of wheat flour until March 31, 2009.

In MY 2007/08, the government has so far contracted 1.8 million tons of wheat imports for shipment through March 2008, which include 511,000 tons through an STC tender on July 27, 2007, (at a weighted average price of $325.59 per ton), 795,000 tons though another STC tender of August 30, 2007, (at a weighted average price of $389.45 per ton), 342,500 tons through an MMTC tender of November 12, 2007 (at a weighted average price of $400.19 per ton), and 150,000 tons through a PEC tender of November 26, 2008 (at a weighted average price of $396.9 per ton). Major suppliers were Russia, Ukraine, Canada, and Argentina. Another STC wheat tender for 350,000 tons on December 10, 2007, was scrapped, as the bids received were very high ranging from $460 to $580 per ton. With international wheat prices continuing to be high, it is unlikely that the government will import additional wheat this marketing year. There were no private imports this year of wheat due to lack of parity between domestic and international prices. Due to unreasonable phytosanitary requirements (see Policy and Marketing sections) for imported wheat, the United States could not participate in any of the government wheat tenders.

On February 9, 2007, the GOI banned exports of wheat and wheat products until December 31, 2007, which was further extended indefinitely on October 8, 2007. Had there been no export restrictions, large quantities of Indian wheat would have moved to countries such as Bangladesh and other Southeast Asian countries as Indian wheat is currently the lowest priced in the global market priced at less than $300 per ton (FOB).

Stocks

Government-held wheat stocks, a major determinant of the government's wheat trade decisions, are projected at around 5.5 million tons on April 1, 2008, somewhat higher than a year ago, and 1.5 million tons above the government’s desired April 1 buffer stock (strategic) requirement of 4.0 million tons.

As government wheat procurement is unlikely to increase significantly from last year's low of 11.1 million tons, no large build up in government wheat stocks is expected in MY 2008/09. On the contrary, government wheat supplies will come under increased pressure as the demand for wheat through the PDS continues to rise. Unless the government resorts to wheat imports, stocks by the end of MY 2008/09 on March 31, 2009, could fall below the desired buffer stock level of 4 million tons. Estimates of private-held wheat stocks are not available, but are expected to be minimal. The PS&D table does not include private-held stocks.

Marketing

Despite numerous discussions at technical and policy levels, U.S. wheat still cannot be exported to India. The government's unreasonable phytosanitary requirement pertaining to the identified (31) quarantine weed seeds (total 100 quarantine seeds per 200 kilogram wheat sample drawn from a single consignment) has effectively banned U.S. wheat shipments to India and forced other exporters to raise bid prices to cover excessive cleaning and the risk of cargo rejection in India. As a result, Indian importers pay a significantly higher price than other importing nations for similar or lower quality wheat. Furthermore, Indian consumers are denied access to their preferred white wheat. Several state governments have recently complained to the Central government about the low quality of imported 'red' wheat they are receiving for PDS distribution. The Indian wheat-based food industry is modernizing and the fast food industry is growing rapidly, both of which generate demand for specialty flours (pizzas and burger buns) that require varieties of wheat that India does not grow. There is rising consumption of wheat in south India due to increased urbanization.

Policy

Wheat imports by the government attract a zero import duty. The domestic wheat shortage and higher prices forced the government to lower the duty on wheat imports by the private trade to 5 percent from 50 percent effective June 28, 2006, and further to zero percent effective September 9, 2006, until February 28, 2007, which was further extended up to December 31, 2007.

The government also temporarily modified some phytosanitary conditions on wheat imports, which include the acceptance of phosphine fumigation in place of the ozone-depleting methyl bromide, and establishing a tolerance level for ergot and quarantine weed seeds, until February 28, 2007, which was further extended only up to June 30, 2007.

On February 9, 2007, the GOI banned exports of wheat and wheat products until December 31, 2007, which was further extended indefinitely on October 8, 2007.

The government on December 26, 2007, permitted duty-free imports of wheat flour until March 31, 2009. The government has permitted states to impose stock limits on the private trade wheat under the Essential Commodities Act and has banned futures trading in wheat to check wheat prices. The government has also asked large trading companies operating in India to declare their stock levels.

Table 3: Commodity, Wheat, Import Trade Matrix

Country	India				
Commodity	Wheat				
Time Period	Apr-Mar	Units:	1000 MT		
Imports for:	2006		**2007**	1/	
U.S.	0	U.S.		0	
Others		Others			
Russia	2,081	Russia	88		
Canada	1,307	Pakistan	51		
Australia	1,094	Canada	1		
Ukraine	333				
France	265				
Hungary	258				
Romania	250				
Bulgaria	238				
Argentina	152				
Czech Republic	72				
Total for Others	6,050		140		
Others not Listed	30		0		
Grand Total	6,080		140		
1/ April through September 2007 (Preliminary GOI data)					
Source: Directorate General of Commercial Intelligence & Statistics, GOI					

Table 4: Commodity, Wheat, Prices Table

Prices Table			
Country	India		
Commodity	Wheat		
Prices in	Rupees	per uom	100 Kg
Year	2006	2007	% Change
Jan	1020	1080	6%
Feb	943	1040	10%
Mar	933	1040	11%
Apr	835	950	14%
May	850	915	8%
Jun	860	950	10%
Jul	865	1025	18%
Aug	980	1020	4%
Sep	1000	1020	2%
Oct	1050	1030	-2%
Nov	1140	1030	-10%
Dec	1090	1030	-6%
Exchange Rate	Rs. 39.50	Local Currency/US $	
Date of Quote	2/12/2008	MM/DD/YYYY	
Delhi Wholesale Price for Common Wheat			
Source: Department of Consumer Affairs, GOI			

RICE

Table 5: Commodity, Rice, Milled, PSD

PSD Table									
Country	India								
Commodity	Rice, Milled						(1000 HA) (1000 MT) (MT/HA)		
	2006	Revised		2007	Estimate		2008	Forecast	
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New
Market Year Begin		10/2006	10/2006		10/2007	10/2007		10/2008	10/2008
Area Harvested	44000	44000	44000	44000	44000	44000	0	0	44500
Beginning Stocks	10520	10520	10520	11430	11430	11430	11230	11230	12000
Milled Production	92760	92760	93350	92000	92000	94080	0	0	94500
Rough Production	139154	139154	140039	138014	138014	141134	0	0	141764
Milling Rate (.9999)	6666	6666	6666	6666	6666	6666	0	0	6666
MY Imports	0	0	0	0	0	0	0	0	0
TY Imports	0	0	0	0	0	0	0	0	0
TY Imp. from U.S.	0	0	0	0	0	0	0	0	0
Total Supply	**103280**	**103280**	**103870**	**103430**	**103430**	**105510**	**11230**	**11230**	**106500**
MY Exports	4200	4200	5500	3400	2200	2500	0	0	2500
TY Exports	3800	3800	5000	3400	2000	2500	0	0	2500
Total Consumption	87650	87650	86940	88800	90000	91010	0	0	93000
Ending Stocks	11430	11430	11430	11230	11230	12000	0	0	11000
Total Distribution	**103280**	**103280**	**103870**	**103430**	**103430**	**105510**	**0**	**0**	**106500**
Yield (Rough)	3.162591	3.162591	3.182705	3.136682	3.136682	3.207591	0	0	3.185708
								TS=TD	
								-11230	

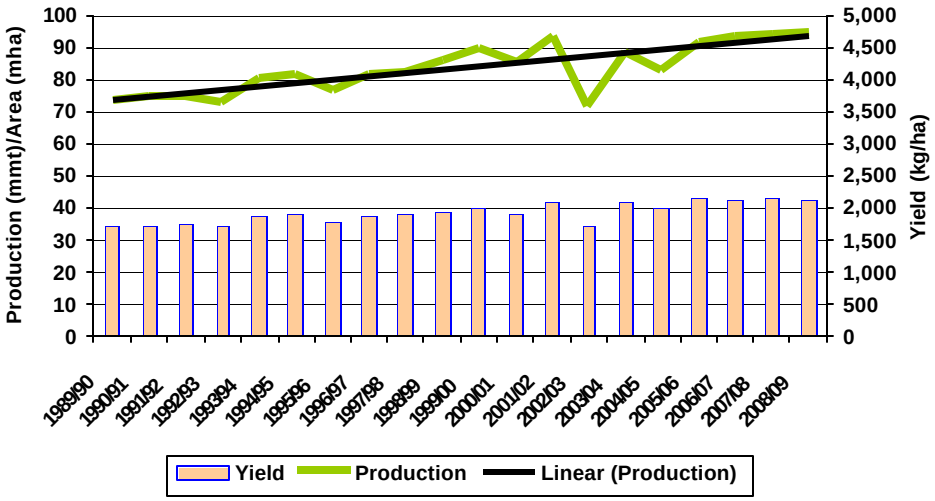
Production

Assuming normal weather conditions, Post forecasts MY 2008/09 rice production at 94.5 million tons from 44.5 million hectares, marginally higher than the estimated MY 2007/08 level of 94.0 million tons. Although rice production has been showing a steady upward trend since the late 80's, typically rice production is more volatile compared to wheat as a poor monsoon could bring this largely non-irrigated crop (only around 52 percent of the crop has assured irrigation) down by as much as 10 million tons. The government's preliminary estimate placed MY 2007/08 *kharif* (fall and early winter harvested) rice production at 81.5 million tons, about one million tons higher than the MY 2006/07 output. The mostly irrigated *rabi* (spring-harvested) rice production is estimated to decline marginally from last year's 13.2 million tons to 12.7, taking total MY 2007/08 rice production to 94.0 million tons.

Rice is predominantly a rain-fed crop (except for the major rice surplus states of Punjab, Haryana, Andhra Pradesh, and Tamil Nadu), and production is subject to wide year-to-year fluctuations compared with wheat. Yields have plateaued in recent years (**Fig. 2**) and many scientists have expressed concern that current Indian rice production techniques cannot

sustain the growing domestic population. Scientific studies presented at the International Rice Research Conference in October 2006 showed that the results of a climate change impact assessment are that general rice yields being affected in all parts of India.

Fig. 2 Rice: Area, Production, and Yield



Use of high-yielding seed varieties is largely confined to the states that use irrigation. Fertilizer application at the national level is not high, but is near optimum in these states. Area under hybrid rice cultivation is estimated to have increased from 10,000 hectares in 1995 to 1.3 million hectares presently concentrated mostly in eastern Uttar Pradesh, Bihar, Jharkhand, and Chhattisgarh. Several hybrid seed varieties with specific consumer-preferred grain quality characteristics are reportedly under development both by government research institutes and by private companies, availability of these varieties are expected to accelerate hybrid rice adoption by Indian farmers. Furthermore, the National Food Security Mission contains a target to cover 3 million ha rice area under hybrid rice by the year 2011-12, to achieve the objective of increasing rice production by 10 million tons by 2011/12. The "System of Rice Intensification" technology, which requires less irrigation and uses more organic manures, is becoming popular in some rice growing states. Although efforts are underway to develop biotech varieties of rice (Golden rice), approval and commercialization of these are still years away. Some of the surplus rice growing states in the north are attempting to diversify the intensive rice/wheat rotation due to ecological concerns such as a low water table and soil health, but a significant shift is not imminent in the absence of a more profitable rotation and due to the government's renewed emphasis on rice and wheat production for food security reasons.

Consumption

High rice prices in recent months could affect consumption in MY 2007/08 and, if continued, also in MY 2008/09. Because of recent wheat shortages, the government supplied more rice through the PDS in place of wheat, which resulted in a significant increase in rice off take through the PDS, reaching an estimated 25 million tons in recent years. Lower procurement and a decline in rice stocks could prompt the government to reduce the distribution of rice though the PDS this year.

More than 4,000 varieties of rice are grown in India to meet varied consumer preferences. For government procurement purposes, however, rice is classified into two categories:

common (length to breadth ratio less than 2.5) and Grade A (length to breadth ratio more than 2.5). Historically, most government-procured rice came from millers who were obliged to sell the government a portion of their milled rice (ranging from 75 percent in Punjab and Haryana to 50 percent in Andhra Pradesh, and even lower in marginal surplus states) at established rates, called the "levy price," which is linked to the support price of paddy and milling costs. But in recent years, most of the procurement by the government is in the form of paddy bought at the support price, which the government then has custom milled.

Concerned over the slow procurement of rice this marketing year, the government announced a Rs. 1,000 ($25.3) per ton bonus in two installments over and above the previously established higher support price of Rs. 6,450 per ton for Common varieties and Rs. 6,750 for Grade A varieties of paddy (un-milled rice), taking the effective support prices to Rs. 7,450 ($188.6) and Rs.7,750 ($196.2) per ton respectively for Common and Grade A varieties. Support prices in MY 2006/07 were Rs. 6,200 per ton for Common varieties and Rs. 6,500 per ton Grade A varieties. As in the case of wheat, the government has not increased the sales price of rice distributed through the PDS since July 1, 2002, although the support price has increased by around 44 percent since then, further contributing to the increasing food subsidy.

The following table shows the government's support price for paddy and the sales price of milled rice through the public distribution system:

Table 6: Government Support Price of Paddy and Issue Price of Rice

Marketing Year (Oct-Sep)	Support Price for Paddy (Un-mille rice) Rs. per ton		PDS Issue Price for Milled Rice Rs. Per ton	
	Common	Grade A	APL (Common/Grade A)	BPL
2000/01	5,100	5,400	10,870/11,300	5,650
2001/02	5,300	5,600	7,950/8,300	5,650
2002/03	5,500	5,800	7,950/8300	5,650
2003/04	5,500	5,800	7,950/8,300	5,650
2004/05	5,600	5,900	7,950/8,300	5,650
2005/06	5,700	6,000	7,950/8,300	5,650
2006/07	6,200	6,500	7,950/8,300	5,650
2007/08	7,450	7,750	7,950/8,300	5,650

Note: Current exchange rate is Rs. 39.50 = 1 US$
APL = Above Poverty Line; BPL = Below Poverty Line

Government domestic rice procurement during MY 2007/08, through January 2008, was marginally higher than the previous year at this time at around 17.3 million tons. Total MY 2007/08 procurement is likely to be somewhat higher than MY 2006/07 procurement of 25.0 million tons, but below the record procurement of 27.7 million tons in MY 2005/06.

Trade

Indian rice exports in MY 2007/08 (CY 2008) and possibly in MY 2008/09 (CY 2009) are likely to decline sharply to 2.5 million tons as a result of the government imposing a minimum export price of $425 per ton for non-basmati rice on October 31, 2007, which was further raised to $500 per ton on December 27, 2007. Exports are likely to be confined mostly to high priced basmati rice (typically around one million tons per year) and an

additional 1.0 to 1.5 million tons of high quality white milled rice, taking total exports to around 2.5 million tons. As domestic supplies are under pressure and government rice procurement is not progressing as expected, and with the national election on the horizon, it is unlikely that the government will relax the export restriction in the near future. On the other hand, there is a possibility of further tightening the export norms.

According to preliminary official statistics, rice exports during January through September 2007 were 4.6 million tons, due to large exports to Bangladesh. MY 2006/07 and CY 2007 rice exports are now estimated higher at 5.5 million tons and 5 million tons respectively, including around 1 million tons of basmati rice. Exports were mostly to Bangladesh, Saudi Arabia (mainly basmati), Ivory Coast, Nigeria, South Africa, United Arab Emirates, and other African countries.

Stocks

Government-held rice stocks on October 1, 2007 were around 5.5 million tons, against 6.0 million tons a year ago and the government's desired minimum buffer stock level of 5.2 million tons. Stocks on January 1, 2008, at 11.5 million tons were marginally below the government's desired strategic buffer stock level of 11.8 million tons. Lower procurement combined with larger off take of rice through the PDS was responsible for the fall in government-held stocks. Stocks are projected to decline to around 5 million tons by the end of MY 2007/08. The PS&D table includes both government stocks and estimated privately-held stocks.

Marketing

Although Indian low-quality white rice exports do not pose a direct challenge to U.S. rice exports, Indian high-quality basmati competes against U.S. rice in several markets, particularly in the European Union and in the Middle East. Indian rice exports, mostly basmati rice, to the U.S. are growing.

Policy

Effective October 9, 2007, the government banned exports of all non-basmati rice to ensure adequate rice availability in the domestic market and to rebuild stocks. However, in response to demand from rice exporters and some governments of major rice exporting states in India, the government decided to establish a minimum export price of $425 per ton on October 31, 2007, which would permit only high quality rice, not required for distribution through the PDS, be exported. However, effective December 27, 2007, the government hiked the minimum export price (MEP) of rice to $500 (Rs. 20,000) per ton (See: http://164.100.9.245/exim/2000/not/not07/not6807.htm). Futures trading in rice is currently prohibited.

Table 7: Commodity, Rice, Milled, Export Trade Matrix

Export Trade Matrix			
Country	India		
Commodity	Rice, Milled		
Time Period	Jan-Dec	Units:	1000 MT
Exports for:	2006		**2007 1/**
U.S.	50	U.S.	68
Others		Others	
Saudi Arabia	687	Bangladesh	946
Nigeria	634	Cote D' Ivorie	570
Bangladesh	510	Saudi Arabia	450
South Africa	367	UAE	276
Cote D' Ivorie	277	South Africa	249
UAE	207	Senegal	201
Cameroon	140	Nigeria	171
Somalia	133	Guinea	169
Yemen	129	Cameroon	115
Kuwait	126	Somalia	109
Total for Others	3210		3256
Others not Listed	1280		1276
Grand Total	4540		4600
1/ January through September 2007 (Preliminary)			
Source: Directorate General of Commercial Intelligence & Statistics, GOI			

Table 8: Commodity, Rice, Milled, Prices Table

Prices Table			
Country	India		
Commodity	Rice, Milled		
Prices in	Rupees	per uom	100 Kg
Year	2006	2007	% Change
Jan	1033	1225	19%
Feb	1040	1190	14%
Mar	1033	1275	23%
Apr	1075	1200	12%
May	1145	1250	9%
Jun	1170	1300	11%
Jul	1160	1250	8%
Aug	1255	1250	0%
Sep	1300	1325	2%
Oct	1300	1400	8%
Nov	1235	1410	14%
Dec	1220	1415	16%
Exchange Rate	39.5	Local Currency/US $	
Date of Quote	2/14/2008	MM/DD/YYYY	
Delhi Wholesale Price for Common Rice			
Source: Department of Consumer Affairs, GOI			

COARSE GRAINS

Production

Assuming a normal monsoon this summer, MY 2008/09 coarse grain production is forecast at 35 million tons, compared with a record production (revised) of 36 million tons in MY 2007/08. The MY 2008/09 production forecast includes 17 million tons of corn, 7 million tons of sorghum, 9.5 million tons of millet, and 1.4 million tons of barley. However, monsoon rains will play a key role, as only 10 percent of the total coarse grain crop is irrigated. Corn planting should benefit from prevailing high domestic and international corn prices.

According to revised official statistics, corn production in MY 2007/08 was a record 16.8 million tons compared with the revised MY 2006/07 production of 15.1 million tons due to favorable growing conditions in major growing states such as Andhra Pradesh, Karnataka, Rajasthan and Madhya Pradesh, and increasing use of hybrid seeds. Sorghum production has slowed in recent years, due to a shift in area from sorghum to soybeans and other commercial crops such as cotton. MY 2007/08 production is officially estimated at 7.3 million tons against the revised MY 2006/07 estimate of 7.2 million tons. Millet production fluctuates widely from year-to-year depending on the monsoon, as it is almost entirely rain-fed. MY 2007/08 production is estimated at around 10.6 million tons, up 1.5 million tons from MY 2006/07 due to favorable growing conditions. Barley production, which is a small winter crop in north India, has remained stagnant at around 1.3 million tons over the past several years. A decline in area due to a shift toward wheat was largely offset by increased yields. Production has failed to respond to increasing demand from India's growing malt-based beer and health food sectors, because of lower returns vis-à-vis wheat. Most of the barley production in India is feed type, six-row varieties, and unsuitable for malting. However, in recent years good malting type barley varieties have been developed under a public-private breeding program. Some malting and brewing companies have initiated contract farming of malting type barley in Haryana, Punjab, and Rajasthan.

Consumption

Coarse grain consumption is forecast at 34 million tons in MY 2008/09, down one million ton from the MY 2006/07 level. Food use accounts for a major share of coarse grain consumption, particularly in the case of sorghum, millet, and barley. In the case of corn, however, 6 to 7 million tons (roughly 50 percent of total consumption) goes for feed use, primarily for poultry feed. Another 1.2 million tons of corn is used by the starch industry. Corn demand by the feed industry had been on the rise after the poultry sector recovered from Avian Influenza in early 2006. However, the recent outbreak of Avian Influenza in West Bengal is likely to retard feed corn demand. Corn demand by the starch industry is growing, reportedly at 20 percent per annum. A significant increase in the support price for corn (from Rs. 5,400 per ton in MY 2006/07 to Rs. 6,200 in MY 2007/08) and higher export demand have pushed domestic corn prices higher, which are currently at around Rs. 7,200 ($183) per ton. The high tannin content in Indian sorghum restricts its use in poultry rations, while its use in the production of industrial alcohol and starch is reportedly increasing. Barley is used mainly for food and feed, although some better quality varieties are used in malting. The total quantity of barley required for malting purposes is estimated at 250,000 tons annually, growing at 10 percent per year. India does not produce any ethanol from cereal grains. Thus, there has been no impact resulting from the domestic ethanol program (which is based on molasses from sugar) on the domestic market for food, feed and trade of cereal grains and its byproducts.

Trade

Under the assumption that the government does not ban corn exports, India's exports in MY 2008/09 are forecast at one million tons, compared with MY 2007/08 exports (estimated) of 700,000, most of which are shipped to neighboring Bangladesh and Sri Lanka and other Southeast Asian and Middle East countries. India's ability to export corn in relatively small quantities is a selling factor. India also exports small quantities of sorghum and millet to places like Sudan, South Africa, and Southeast Asian countries.

High domestic corn prices prompted the government to abolish the import duty on corn on January 25, 2007, through December 2007, only and remove the Tariff Rate Quota (TRQ) restrictions. Previously, corn imports were subject to a TRQ, under which up to 500,000 tons were permitted to be imported at a 15 percent tariff, and quantities above this level attracted a 50 percent duty. Despite the import duty waver, there were no corn imports due to lack of parity with domestic prices.

Marketing

The rapid growth of the poultry and starch industries, combined with slow growth in corn production, is likely to create continued pressure for access to imported corn. Recent experience shows that the government will abolish import duties to keep prices under control. Unlike wheat and rice, the government does not typically maintain a buffer stock of coarse grains to keep prices in check.

Policy

In June 2000, the government established a TRQ for corn imports, under which up to 500,000 tons of corn may be imported annually, subject to an in-quota tariff of 15 percent; above-quota imports face a 50 percent duty. However, in February 2007, the government allowed duty free imports through December 2007 and also removed the TRQ until then to encourage imports. The government notifications regarding this are available at: http://dgftcom.nic.in/exim/2000/not/not06/not4306.htm and www.cbec.gov.in/customs/cs-act/notifications/notfns-2k7/cs9-2k7.htm

The Ministry of Commerce and Industry, on April 7, 2006, announced a supplement to the GOI's Foreign Trade Policy (2004-2009), which requires all imports containing products resulting from modern biotechnology to receive prior approval via the Genetic Engineering Approval Committee (GEAC), as well as mandating a positive declaration stating that the product is "genetically modified." (See: http://164.100.9.245/exim/2000/not/not06/not0206.htm). Importers are responsible for providing this declaration, and likewise are liable if the declaration is incorrect. Punitive action in a case where the consignment does not carry the correct declaration could be up to five times the value of the consignment.

After the domestic starch industry and local poultry industries voiced their concern over large exports of corn by private trade resulting in high domestic prices, on March 5, 2007, the GOI channeled exports of corn only through government parastatals for six months (up to September 4, 2007). (See http://dgftcom.nic.in/exim/2000/not/not06/not5006.htm).

On January 2, 2008, the Ministry of Agriculture proposed a draft Plant Quarantine (Regulation of import into India) Order, 2008, which seeks to specify a somewhat relaxed condition for the imports of barley grains for malting purposes, namely fumigation by phosphine instead of methyl bromide required for import of barley for other uses. (See http://www.plantquarantineindia.org/pdffiles/1st%20Amendment-2008.pdf)
Efforts to produce ethanol from other feed stocks like sweet sorghum, sugar beet, sweet potatoes, etc. are at an experimental stage.

PULSES

Production

India's MY 2008/09 (Apr/Mar) pulse production is forecast at 14.2 million tons, almost unchanged from the MY 2007/08 level. The rabi pulse production this season, which includes chickpeas, peas, and lentils is forecast to decline by around 1 million tons to 8.4 million tons due to a decline in planted area (down 5 percent) and likely lower yields due to lack of winter rains and extremely cool temperatures. However, this was offset by an increase in kharif pulse production (mostly pigeon peas, mung beans, and black matpe) harvested in the fall and early winter of 2007, which is estimated at 5.8 million tons, compared with 4.8 million tons in MY 2007/08.

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 both in the *kharif* and *rabi* seasons, with almost two-thirds produced in the latter. Most pulses 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 yields. Madhya Pradesh, Uttar Pradesh, Maharashtra, Andhra Pradesh, and Karnataka together account for over 70 percent of the country's total pulse production, with Madhya Pradesh alone contributing around 24 percent. Pulse production has failed to respond to the steady increase in prices, due to competition from other crops such as wheat and rice and the high risk involved in pulse cultivation. The government's National Food Security Mission aims to increase pulse production by 2 million tons by 2011/12, mostly through the supply of quality seeds and better agronomic practices.

Consumption

Pulse consumption in MY 2008/09 is forecast to remain unchanged or marginally decline due to high prices of imported pulses. Consumption in MY 2007/08 is estimated at around 17 million tons, including around 2.8 million tons of imported pulses. Despite the fact that India imports significant quantities of pulses, prices continue to remain high due to increasing total demand though 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 2.6 million tons in MY 2008/09, marginally down from MY 2007/08 estimated imports of 2.8 million tons due to likely higher world prices. The recent significant increase in the price of imported pulses in general, and from North America in particular, and high freight costs have added to the cost of imported pulses despite a 12 percent appreciation of the Indian rupee against U.S. dollar during the past year. For instance, the price of green and yellow peas imported from Canada and the U.S. have increased to over $500 a ton in recent months, $100-150 a ton more than a year ago. At such high prices there is import resistance, which could dampen pulse imports in the coming months. MY 2006/07 imports were officially placed at 2.8 million tons, which included 1.4 million tons of peas, 332,000 tons of mung beans, 331,000 tons of black matpe, 247,000 tons of pigeon peas, 127,000 tons of chick peas, 59,000 tons of lentils, and 57,000 tons of kidney beans. Major suppliers were Myanmar, Canada, Australia, France, and the United States. Higher priced U.S. green and yellow peas and lentils are becoming more price competitive in the Indian market due to higher prices in India. Imports of pulses from the U.S., mostly dry green peas, witnessed significant growth during the last 4 years, reaching a

record 177,000 tons, valued at $48.4 million in U.S. FY 2006/07, making India the largest market for U.S. pulses.

Another factor which could affect pulse imports from the U.S. as well as from Canada in the future is the fumigation requirement for the import of pulses. Effective January 1, 2004, pulse (chickpeas, peas) imports from all origins to India were 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, per the Plant Quarantine Regulation of Import into India Order, 2003. As methyl bromide is being phased out due to environmental concerns in most countries, it would be difficult and costly to fumigate pulses with methyl bromide at the port of origin. Unless the fumigation requirement is removed, pulse exports from North America to India will be in jeopardy, which could further exacerbate the Indian pulse supply situation leading to a further significant rise in domestic pulse prices. Recently, the GOI extended up September 30, 2008 the arrangement to import pulses shipped from the United States and Canada subject to fumigation by methyl bromide at the port of arrival in India.

Marketing

India's "price buyers" of pulses are unwilling to pay a significant premium for 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 the U.S. supply of peas and chickpeas and making it more price competitive vis-à-vis Canada, as India is likely to remain a huge market for pulses in coming years.

Policy

In a move to contain the rising prices of pulses in the domestic market, effective June 8, 2006, the Indian government exempted pulses from the applicable 10 percent import duty through March 31, 2009.

On January 23, 2007, the Indian government de-listed futures trading in *tur* (pigeon pea) and *urad* (mung beans) until further notice under the assumption that futures contract trading was responsible for the high prices of pulses. Several state governments have imposed stocks limits on pulses held by the private trade to control the price rise.

Effective June 22, 2006, the GOI imposed a ban on the export of pulses, with the exception of *kabuli chana* (garbanzos), which will be in force up to March 31, 2008.

The GOI authorized government agencies/trading companies such as NAFED, STC, PEC, and MMTC to import 1.5 million tons of pulses in MY 2007/08 through December 2007. Imports by these agencies would qualify for a subsidy of up to 15 percent. These import policy changes are designed to keep pulse prices from rising.

Table 9: Commodity, Corn, PSD

PSD Table									
Country	**India**								
Commodity	**Corn**						(1000 HA) (1000 MT) (MT/HA)		
	2006	Revised		2007	Estimate		2008	Forecast	
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New
Market Year Begin		11/2006	11/2006		11/2007	11/2007		11/2008	11/2008
Area Harvested	8300	8300	7800	8600	8600	8300	0	0	8400
Beginning Stocks	264	264	264	244	244	244	644	600	644
Production	14980	14980	15100	16300	16300	16780	0	0	17000
MY Imports	0	0	0	0	0	0	0	0	0
TY Imports	0	0	0	0	0	0	0	0	0
TY Imp. from U.S.	0	0	0	0	0	0	0	0	0
Total Supply	**15244**	**15244**	**15364**	**16544**	**16544**	**17024**	**644**	**600**	**17644**
MY Exports	400	400	400	500	500	700	0	0	1000
TY Exports	450	450	450	500	500	700	0	0	1000
Feed Consumption	6300	6300	6420	7000	7000	6300	0	0	6500
FSI Consumption	8300	8300	8300	8400	8444	9380	0	0	9494
Total Consumption	14600	14600	14720	15400	15444	15680	0	0	15994
Ending Stocks	244	244	244	644	600	644	0	0	650
Total Distribution	**15244**	**15244**	**15364**	**16544**	**16544**	**17024**	**0**	**0**	17644
Yield	1.804819	1.804819	1.935897	1.895349	1.895349	2.021687	0	0	2.02381
								TS=TD	
								-600	

Table 10: Commodity, Sorghum, PSD

PSD Table									
Country	India								
Commodity	Sorghum						(1000 HA) (1000 MT) (MT/HA)		
	2006	Revised		2007	Estimate		2008	Forecast	
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New
Market Year Begin		11/2006	11/2006		11/2007	11/2007		11/2008	11/2008
Area Harvested	9100	9100	8510	9000	9000	8400	0	0	8100
Beginning Stocks	145	145	145	220	220	220	200	200	200
Production	7400	7400	7150	7600	7600	7340	0	0	7000
MY Imports	0	0	0	0	0	0	0	0	0
TY Imports	0	0	0	0	0	0	0	0	0
TY Imp. from U.S.	0	0	0	0	0	0	0	0	0
Total Supply	**7545**	**7545**	**7295**	**7820**	**7820**	**7560**	**200**	**200**	**7200**
MY Exports	25	25	25	25	25	25	0	0	0
TY Exports	25	25	25	25	25	25	0	0	0
Feed Consumption	1200	1200	1200	1200	1200	1250	0	0	1200
FSI Consumption	6100	6100	5850	6395	6395	6085	0	0	5850
Total Consumption	7300	7300	7050	7595	7595	7335	0	0	7050
Ending Stocks	220	220	220	200	200	200	0	0	150
Total Distribution	**7545**	**7545**	**7295**	**7820**	**7820**	**7560**	**0**	**0**	**7200**
Yield	0.813187	0.813187	0.840188	0.844444	0.844444	0.87381	0	0	0.864198
								TS=TD	
								-200	

Table 11: Commodity, Millet, PSD

PSD Table									
Country	**India**								
Commodity	**Millet**						(1000 HA) (1000 MT) (MT/HA)		
	2006	Revised		2007	Estimate		2008	Forecast	
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New
Market Year Begin		11/2006	11/2006		11/2007	11/2007		11/2008	11/2008
Area Harvested	9500	9500	10300	10000	10000	10800	0	0	10500
Beginning Stocks	200	200	200	160	200	160	160	200	160
Production	10560	10560	9070	10500	10500	10610	0	0	9500
MY Imports	0	0	0	0	0	0	0	0	0
TY Imports	0	0	0	0	0	0	0	0	0
TY Imp. from U.S.	0	0	0	0	0	0	0	0	0
Total Supply	**10760**	**10760**	**9270**	**10660**	**10700**	**10770**	**160**	**200**	**9660**
MY Exports	0	0	0	0	0	0	0	0	0
TY Exports	0	0	0	0	0	0	0	0	0
Feed Consumption	800	800	800	800	800	850	0	0	850
FSI Consumption	9800	9760	8310	9700	9700	9760	0	0	8660
Total Consumption	10600	10560	9110	10500	10500	10610	0	0	9510
Ending Stocks	160	200	160	160	200	160	0	0	150
Total Distribution	**10760**	**10760**	**9270**	**10660**	**10700**	**10770**	**0**	**0**	**9660**
Yield	1.111579	1.111579	0.880583	1.05	1.05	0.982407	0	0	0.904762
								TS=TD	
								-200	

Table 12: Commodity, Barley, PSD

PSD Table									
Country	India								
Commodity	Barley						(1000 HA) (1000 MT) (MT/HA)		
	2006	Revised		2007	Estimate		2008	Forecast	
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New
Market Year Begin		04/2006	04/2006		04/2007	04/2007		04/2008	04/2008
Area Harvested	700	700	700	770	770	770	0	0	750
Beginning Stocks	34	34	34	34	34	34	34	34	34
Production	1220	1220	1220	1310	1310	1330	0	0	1400
MY Imports	0	0	0	0	0	0	0	0	0
TY Imports	0	0	0	0	0	0	0	0	0
TY Imp. from U.S.	0	0	0	0	0	0	0	0	0
Total Supply	**1254**	**1254**	**1254**	**1344**	**1344**	**1364**	**34**	**34**	**1434**
MY Exports	0	0	0	0	0	0	0	0	0
TY Exports	0	0	0	0	0	0	0	0	0
Feed Consumption	100	100	100	100	100	100	0	0	100
FSI Consumption	1120	1120	1120	1210	1210	1230	0	0	1304
Total Consumption	1220	1220	1220	1310	1310	1330	0	0	1404
Ending Stocks	34	34	34	34	34	34	0	0	30
Total Distribution	**1254**	**1254**	**1254**	**1344**	**1344**	**1364**	**0**	**0**	**1434**
Yield	1.742857	1.742857	1.742857	1.701299	1.701299	1.727273	0	0	1.866667
								TS=TD	
								-34	

Table 13: Commodity, Peas, PSD

PSD Table									
Country	**India**								
Commodity	**Peas**						(1000 HA) (1000 MT) (MT/HA)		
	2006	Revised		2007	Estimate		2008	Forecast	
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New
Market Year Begin		04/2006	04/2006		04/2007	04/2007		04/2008	04/2008
Area Harvested	0	590	720	0	590	810	0	0	680
Beginning Stocks	0	0	0	0	0	0	0	0	0
Production	0	800	800	0	800	850	0	0	750
MY Imports	0	900	1390	0	900	1300	0	0	1200
TY Imports	0	900	1390	0	900	1300	0	0	1200
TY Imp. from U.S.	0	90	90	0	100	190	0	0	150
Total Supply	**0**	**1700**	**2190**	**0**	**1700**	**2150**	**0**	**0**	**1950**
MY Exports	0	0	0	0	0	0	0	0	0
TY Exports	0	0	0	0	0	0	0	0	0
Feed Consumption	0	0	0	0	0	0	0	0	0
FSI Consumption	0	1700	2190	0	1700	2150	0	0	1950
Total Consumption	0	1700	2190	0	1700	2150	0	0	1950
Ending Stocks	0	0	0	0	0	0	0	0	0
Total Distribution	**0**	**1700**	**2190**	**0**	**1700**	**2150**	**0**	**0**	**1950**
Yield	0	1.355932	1.111111	0	1.355932	1.049383	0	0	1.102941