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Report Name: COVID-19 in India - Production Update for Rabi Crops

Country: India

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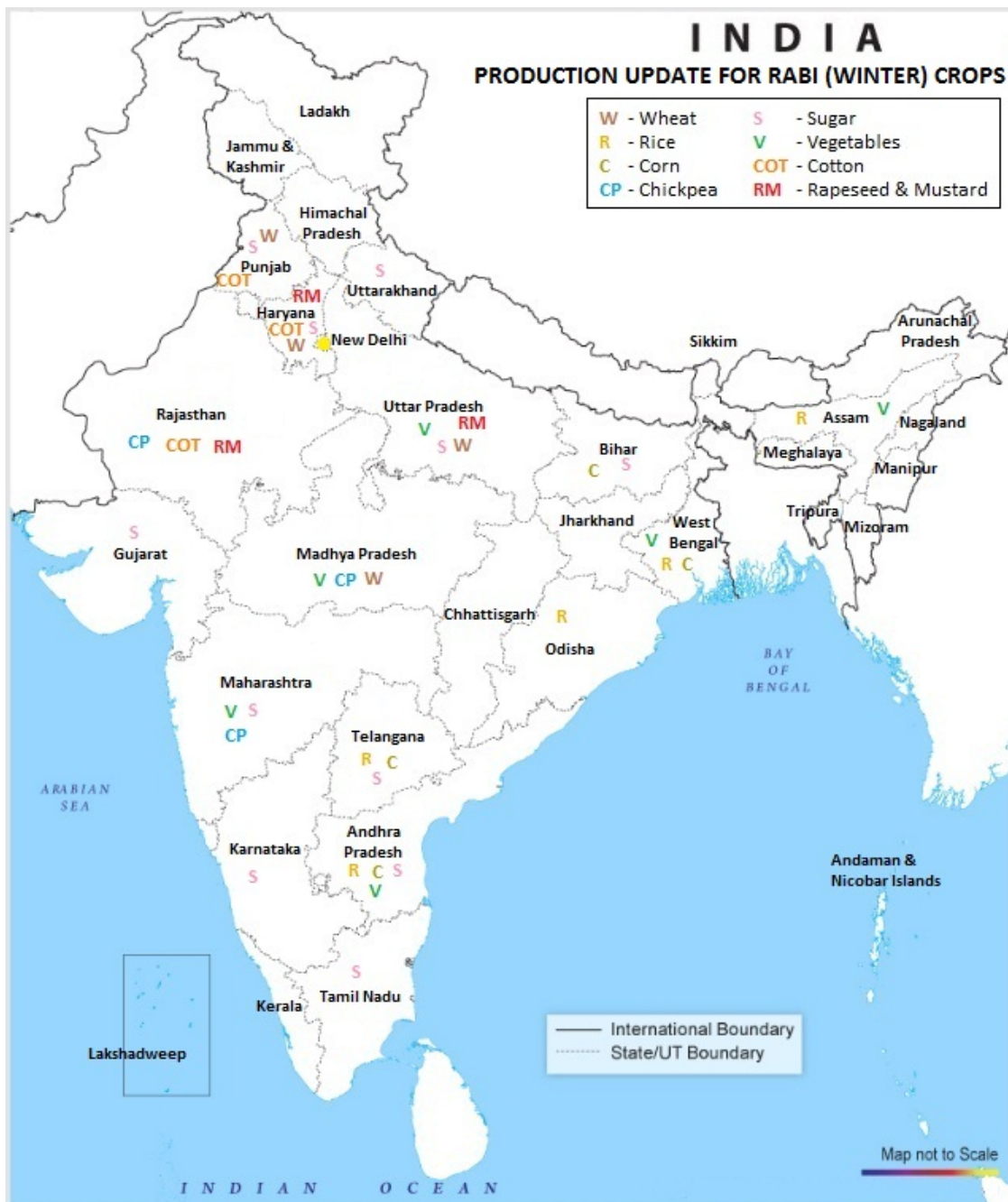
Report Category: Agricultural Situation, Agriculture in the News

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Report Highlights:

Weekly Report as of April 24, 2020, of COVID-19 impact on the Indian harvest of Rabi (Winter) crops.



Indian Production Update for *Rabi* (winter) Crops as of Friday, April 24, 2020

WHEAT [W]: Due to favorable weather conditions throughout the growing season, India is on track for another record wheat harvest, the leading crop during *rabi* season. An extended winter and late rains delayed harvest by two weeks, but now is in full swing. Field sources report that harvest has not been impacted by machinery or labor shortages due to the COVID-19 lockdown. **Uttar Pradesh** is India's leading wheat producer and the leading supplier to private trade due to relatively weak government MSP procurement operations and lower taxes. Sources report that about 55-60 percent of the crop is harvested and will conclude by early May. **Madhya Pradesh** is the leading producer of quality wheat, supplying both government and private trade. Almost 95 percent is harvested, with the remaining crop to be harvested by the end of April. **Punjab** is the leading contributor to the GOI's procurement program. Sources report that about 35-40 percent of the crop is harvested, with the balance finishing the first week of May. In **Haryana**, about 65-70 percent of the crop has been harvested, with the balance wrapping-up by the end of April.

RICE [R]: Sufficient late 2019 monsoon rains and subsequent improved availability of irrigation water in India's southern and eastern states are supporting a record *rabi* rice crop this season. Harvest started the first week of April in most states and will continue through the end of July. **West Bengal** is the leading *rabi* rice producer but contributes relatively less to GOI procurement programs as most farms are small and have less marketable surpluses. Harvest started the first week of April and will continue through the end of May. **Andhra Pradesh** and neighboring **Telangana** are the two leading *rabi* rice producers in southern India and contribute significantly to GOI MSP procurement. Harvest started the last week of March; about 40 percent of the area has been harvested and will continue through the end of May. The **Odisha** and **Assam** *rabi* rice harvest will begin in May and continue through July.

CORN [C] Corn produced in the *rabi* season accounts for less than one third (about 8 MMT) of the total corn production in India, mostly in the eastern and southern states under semi-irrigated conditions. Harvest began in the first week of March and was over by the first week of April in major states. **Bihar** and **West Bengal** are the two leading *rabi* corn producers in east India, which supplies corn for the poultry and industrial use sectors. Harvest is over, but farmers will be marketing their product through June. **Andhra Pradesh** and **Telangana** are the two leading *rabi* corn producers in south India.

CHICKPEA [CP] is the leading *rabi* season pulse accounting for nearly half (over 11 MMT) of India's total pulse production. The chickpea harvest concluded by the first week of April in the major producing states due to its relatively short growing season. Marketing is likely to continue through May due to Covid-19 related restrictions which

have affected sales. **Madhya Pradesh** is the leading chickpea producing state, followed by **Rajasthan** and **Maharashtra**. These states concluded their chickpea harvests on schedule, but in the onset experienced weak sales. In the first week of April, the Indian Government initiated MSP procurement to support weak farm gate prices and private traders have also resumed business with the relaxation of the lockdown.

SUGAR [S]: India is currently experiencing a strong supply and weak demand for sugar. As of mid-April, harvesting of sugar was completed in the states of **Maharashtra** and **Gujarat** in the western zone; **Andhra Pradesh**, **Telangana** and **Karnataka** in the south, and **Punjab** in the north. Harvest is more than 90% complete in **Tamil Nadu**, **Haryana**, **Bihar** and **Uttarakhand**. India's top sugar producer, **Uttar Pradesh** (UP; north) has completed 80% of its harvest, and will finish in mid-May. During the first half of April, harvesting operations in UP and Maharashtra were impacted by COVID-19-induced labor shortages. Planting of late season sugarcane, or spring cane, is underway in **UP**, **Tamil Nadu** and **Uttarakhand**.

VEGETABLES [V]: *Kharif* horticulture sowing begins in early May across India which includes essential crops such as onions and tomatoes. Currently, the majority of the country is harvesting horticulture from the *rabi* season. Supply side constraints were observed due to labor shortages and lack of transportation for products, especially with intrastate truck movement. In Azadpur, Asia's largest wholesale market which serves terminal wholesale markets across the country, there are close to 100 truckloads of unsold onions. Sources indicate the offtake of fruits and vegetables have plunged by almost 40 percent, due to lowered demand from bulk buyers.

For **Maharashtra** in the West Zone, mango and cashew harvests are ongoing. Land preparation for sowing cucurbits, coriander, and other summer vegetables will soon commence in **Madhya Pradesh** and **Maharashtra**. Ginger and turmeric planting will begin this month in **Andhra Pradesh** in the South. Whereas, in the East Zone, ginger, cucumber, citrus and banana plantings will commence in **West Bengal** and **Assam**. In **Uttar Pradesh**, farmers are preparing land for planting tomatoes, chilies, okra, pumpkin and eggplant.

COTTON [COT]: While the harvest of winter wheat (*Rabi* crop) has been delayed by 10-15 days due to untimely rains, the sowing of cotton will be underway once harvesting operations are complete. The GOI is advising farmers in the Northern states of **Punjab**, **Haryana** and **Rajasthan** to begin field preparations for sowing cotton as April/May is the ideal sowing time. The area planted to cotton is expected to increase, as the reduced availability of migrant labor for transplanting rice is expected to prompt farmers to consider planting cotton, which is less labor intensive. In addition, assured GOI procurement will likely prompt farmers to consider cotton as a 'standby' crop, even as seed cotton prices are 20 percent below the MSP.

RAPESEED & MUSTARD [RM]: The harvest is complete for the rapeseed and mustard crop, which was planted on 6.9 million hectares throughout the country. As the primary winter-sown oilseeds in India, Post had previously estimated MY2019/20 rapeseed and mustard crop at 7.7 mmt. However, unfavorable March weather conditions including hail and untimely rains have appeared to damage crops. No loss estimations as of yet, and it is unknown if these weather conditions were sporadic or widespread. Crop damage was reported in **Haryana**, **Uttar Pradesh** and **Rajasthan**. Procurement is in process by the National Agricultural Cooperative Marketing Federation of India and State government agencies which began on April 15 and will continue through June 30.

Attachments:

No Attachments.