United States Department of Agriculture
Foreign Agricultural Service

GAIN
Global Agricultural Information Network

Required Report: Required - Public Distribution **Date:** April 19,2020

Report Number: BG2020-0003

Report Name: Grain and Feed Annual

Country: Bangladesh

Post: Dhaka

Report Category: Grain and Feed

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Report Highlights:

For market year (MY) 2020/21 (May-April), Post forecasts Bangladesh's rice production to increase, assuming favorable weather and increased yield. Rice imports are expected to increase as a result of the COVID-19 pandemic and the Government of Bangladesh's effort to ensure food security. Wheat production is projected higher and imports are forecast to rise to meet increased demand and to alleviate food security concerns. Corn imports are forecast to decrease as a result of increased domestic production and depressed demand from the feed sector as the livestock and poultry industries slow production during the COVID-19 pandemic.

Executive Summary:

For MY 2020/21 (May-April), total rice area is projected to decrease slightly to 11.8 million hectares (HA) and production is projected to increase to 36.3 million metric tons (MMT), assuming good weather and increased yield due to further cultivation of hybrid and high yield varieties (HYV). MY 2019/20, total rice area and production are unchanged. MY 2020/21 rice imports are expected to increase to 200,000 MMT to meet the additional demand caused by the COVID-19 pandemic. MY 2020/21 wheat area and production are forecast upward to 350,000 HA and 1.25 MMT based on reduced farmer concern of a wheat blast attack and strong domestic prices. In MY 2020/21, corn area and production estimates are forecast upward to 550,000 HA and 5.1 MMT. For MY 2020/21, corn imports are forecast downward to 1 MMT because of increased domestic production.

Commodities:
Rice Milled

Production:
For MY 2020/21 (May-April), total rice area and production levels are projected to increase slightly to 11.8 million hectares (HA) and 36.3 million metric tons (MMT), assuming normal weather conditions and increased yield. There is a growing farmer preference for HYV and hybrid seeds because of higher yields. Post forecasts wider use of HYV and hybrid seeds in MY2020/21.

Bangladeshi farmers have expressed increased interest in growing higher margin crops like corn, potato or vegetables during the winter (*Boro*) season (NOTE: Bangladesh has three growing seasons). Multiple farmers expressed concern to FAS Dhaka about the low rice margins during the *Boro season*. Margins drop as a result of large supply during this period. *Boro* rice production accounts for approximately 60 percent of Bangaldesh's annual rice production. The *Boro* rice season is capable of having an impact on domestic market prices throughout the year.

The COVID-19 pandemic will impact the upcoming *Boro* rice harvest. The harvest, which will take place in April, will require a large amount of labor that may not be available. Farmers, although concerned about a labor shortage during harvest, believe this year's crop has benefitted from favorable weather and no major pest or disease infestations.

The Bangladesh Minister of Agriculture tasked his full team to further support farmers during the COVID-19 pandemic. Top officials and agriculture experts are expecting to see an increase in the cost of harvesting and processing rice. Labor, transportation, storage, and processing costs are expected to rise as a result of COVID-19. The Minister has pledged to quickly resolve COVID-19 related issues as they arise.

Table 1. Bangladesh: *Boro, Aus,* and *Aman* Rice Area and Production Estimates

Rice by Season	2018/19 (Estimate)		2019/20 (Estimate)		2020/21 (Forecast)	
	Area 1,000 HA	Production 1,000 MT	Area 1,000 HA	Production 1,000 MT	Area 1,000 HA	Production 1,000 MT
Boro (Winter)	4,752	18,909	4,850	19,400	4,750	19,500
Aus (Pre Monsoon)	1,145	2,500	1,100	2,450	1,150	2,600
Aman (Monsoon)	5,873	13,500	5,880	14,000	5,900	14,200
Total Rice	11,770	34,909	11,830	35,850	11,800	36,300

Note: *Boro season rice (Boro rice) is planted in 2019 and harvested and marketed in April-May, 2020. Boro rice is therefore the first rice crop in the Market Year (MY) 2020-21 (May-April).*

Consumption:

Rice consumption and residuals forecast in MY 2020/21 is increased to 36.3 MMT due to a steady rise in population and additional rice purchases made during the COVID19 pandemic. The COVID19 rice purchases are being led by the central Government and active non-government organizations (NGOs). The rice is currently being distributed to those living under the poverty line for 10 taka ($0.12 USD) per kilogram. There is also a small increase in consumption to account for the growing demand of rice bran oil production and increased demand from the feed industry for broken rice.

A bag of 40 kg paddy (unhusked rice) in an automatic rice mill produces four types of product and by-products which includes 26 kg of husked rice (62-65 percent), 8.7 kg of rice husk (8.7-9.3 percent), 3.3 kg of rice bran (3.3-3.5 percent) and 2 kg of broken rice (2-2.2 percent). Rice husk is converted to briquettes for use as biofuel and fuel for steam generation in the mill. Rice bran is used in feed processing and to produce rice bran oil, while broken rice is largely used in feed processing.

Trade:

MY 2020/21 rice imports are expected to increase to 200,000 MT due to increased demand in the near term as a result of the COVID-19 pandemic and the GoB's effort to ensure food security. In late March, 2020, Prime Minister Hasina announced the GoB will implement an emergency program to offer subsidized rice for those living under the poverty line. According to local sources, the Government has allocated 500,000 MT of rice in the first phase of the emergency program, which will likely be sourced from domestic production. Rice stocks are reported to currently be stable and sufficient to meet demand. If the pandemic continues for more than two months, the GoB will likely consider a reduction in the import tariff to allow for greater rice imports. The GoB is focused on keeping local rice prices stable.

The MY 2019/20 import forecast is lowered to 15,000 MT due to an abundant *Aman* rice harvest last year and a high import tariff (55 percent) imposed by the GoB in May, 2019. In January, 2020, the GoB also announced a plan to offer farmers a subsidy of 15 percent for rice exports to encourage further exports and protect farmers from low domestic prices. More information on the MY 2019/20 export subsidy can be found in the policy section of this report.

The rice imported into Bangladesh is largely Basmati rice for upper class consumers. Coarse rice is also imported when local rice price is comparatively higher than neighboring producers. The rice import in MY 2018/19 is lowered to 400,000 MT following USDA official data.

Stocks:

According to the Ministry of Food (MOF), as of March 24, 2020, public rice stocks are 1.39 MMT, which is approximately 4.35 percent higher than last year. In 2019, the government procured record high levels of *Aman* rice to support domestic prices. A large percentage of those procurements remain in stocks.

The relatively high rice and wheat stocks are providing relief to the GoB as it addresses food security issues related to COVID-19. The GoB has allocated BDT 88,972,264 (US$ 1 million) and 31,217 tons of rice for people of low-income group from 64 districts. This rice and financial assistance will be distributed through the Disaster Management and Relief Ministry. It is too early to determine the full range of the impact of COVID-19 on rice production, trade, and stocks but it is clear that there will be an impact.

From November 20, 2019 to March 5, 2020, the GOB procured 626,657 MT of *Aman* rice (Unhusked/unmilled rice) from the farmers and 380,800 MT of *Aman* rice (husked/milled) from the millers for state reserves, with offering per kilogram BDT 26 (US$0.31) for paddy (unhusked), BDT 36 (US$0.42) parboiled rice and BDT 35 (US$0.41) for non-parboiled rice. This was the first time since 2010 that the government procured unmilled rice directly from farmers. The rice is primarily procured for the public distribution system, which distributes rice and wheat to the poor and various government employees.

Table 2. Bangladesh: Stock at public granaries (Thousand MT)

24 March 2020			24 March 2019		
Rice (000 MT)	Wheat (000 MT)	Total (000 MT)	Rice (000 MT)	Wheat (000 MT)	Total (000 MT)
1386.95	307.81	1694.76	1329.09	164.14	1493.23

Source: MIS&M, Director General of Food, Ministry of Food

Prices:

For March 2020, the retail coarse rice prices are BDT 40 ($0.47) per kilogram, which is equivalent to the same month last year (Figure 1). The coarse rice price in March was 17 percent higher than last month due to a sharp increase in demand at the consumer level in response to COVID-19. The GoB has tried to mitigate panic buying with statements about sufficient stocks and food supply.

Policy:

On January 30, 2020, the Government of Bangladesh (GoB) began an export subsidy program for rice, which can be used by exporters meeting the specified criteria to receive cash subsidies up to 15 percent of the export value. The subsidy will end on June 30, 2020, the end of GoB's fiscal year. These export subsidies come after months of low rice prices and oversupply, which have produced backlash from farmers. According to the Ministry of Agriculture, no rice was exported under the subsidy program.

The export subsidy program accompanies the GoB's decision to raise its rice import duty to 55 percent – a move seen as supporting farmers and in response to widespread protests. Bangladesh currently places a 55 percent import duty on semi-milled or whole milled rice (HS Code: 10063090). The import duty is within the country's WTO bound tariff rate for semi- or whole milled rice.

The Ministry of Food (MoF) recently announced its procurement plan for the upcoming *Boro* rice and wheat harvest. The MoF plans to procure 1.15 MMT of boiled and non-boiled rice from rice millers and 600,000 MT unmilled rice from farmers and 75,000 MT of wheat. The government will purchase per kilo boiled rice at BDT 36 (US$ 0.42) and non-boiled rice at BDT 35 (US$0.41) and unmilled rice at BDT 26 (US$0.30). Rice procurement will take place from April 26 through August 31, 2020 and wheat from April 15 to June 30, 2020. The *Boro* milled rice procurement of this year harvest is close to last year but unmilled rice procurement is approximately 50 percent higher than last year. The GoB plans to soon introduce technology (e.g., mobile applications) in the procurement process to reduce miss management.

The Ministry of Agriculture (MoA) plans to allocate BDT 1 billion (US$ 11.7 million) towards a farm equipment subsidy. The subsidy will cover 50 percent of the cost for certain equipment (e.g., combine harvester). The machinery, if purchased, would enable farmers to become more efficient and reduce their dependence on a large labor force during harvest season. The MoA estimated farmers across the country will buy approximately 800 combine harvesters, and 400 reapers and transplanters over the duration of the subsidy program.

Marketing:

Bangladeshi consumers typically purchase lower-quality (25 percent or more broken) parboiled rice. A small niche market exists for high quality (e.g. basmati) rice imports. Historically, U.S. rice exports have not been price competitive.

Commodities:
Wheat

Production:
MY 2020/21 wheat area estimate is forecast up to 350,000 HA. Some farmers are expected to plant wheat in place of corn on expectations of higher profit margins and reduced exposure to wheat blast, a fungal disease that impacted Bangladesh's wheat harvest two years ago. MY 2020/2021 production is estimated at 1.25 MMT assuming favorable weather conditions.

The MY 2019/20 (July – June) wheat production estimate is unchanged assuming favorable weather conditions in the spring of 2020. The winter crop wheat will be harvested in April. Farmers have expressed optimism about this year's crop, stating wheat blast was not as big of concern this year relative to previous crops.

Imports:
In MY 2020/21 (July-June), wheat imports are forecast upward to 6.4 MMT with an expectation of a continued increase in wheat use in diversified products (e.g., baking shops, food processing), growing consumer demand for wheat-based products, and low international prices. In CY 2019, major wheat suppliers include Russia (39 percent), Ukraine (34 percent), Canada (20 percent), and the United States (3.5 percent).

MY 2019/20 (July – June), Post's wheat import forecast is up to 6.3 MMT to account for a push by importers to meet a sudden increase in demand as a result of the COVID-19 pandemic. At the time of publication, Russia and other EAEU countries are considering limited restrictions on wheat exports. Any export restriction by Russia and other regional wheat exporters will impact Bangladesh's imports.

Consumption:
The wheat consumption forecast is raised to 7.45 MMT in MY 2020/21, assuming more consumption of processed foods made from wheat flour. The consumption of wheat is increasing due to changing consumer behavior as a result of increased per capita income and improved socio-economic conditions. Entrepreneurs are investing into the processed food sector, especially into the shelf-stable bread and biscuit sectors.

Stocks:
According to the MOF, as of March 24, 2020, public wheat stocks are estimated at 307,810 MT, which is 87.5 percent higher than last year. In order to keep consistent stock levels, the GOB procured additional wheat from local farmers. The GoB will closely monitor stock levels throughout the COVID19 pandemic and currently plans to allocate 100,000 MT of wheat to those living under the poverty line. The government may need to import wheat at the end of the current market year if stocks drop too low. The GoB has the capacity to stock two MMT of rice and wheat. There is no public information on private stock capacity.

The Ministry of Food (MoF) recently announced its procurement plan for the upcoming wheat harvest. The MoF plans to procure 75,000 MT of wheat.

Prices:

In March 2020, the average retail price of loose wheat flour (*atta*) was BDT 34 (US$0.4) per kilogram (See Figure 2), which is a three year high and 6.25 percent higher than the same month last year. The increased price is likely the result of panic buying caused by the COVID-19 pandemic.

Marketing:

Bangladesh is a price sensitive market for wheat. Although Bangladeshi importers may be willing to pay an additional $10 to $15 per ton CIF (cost, freight, and insurance) for premium wheat, this mark-up usually is not enough to cover freight from distant origins. As a result, wheat from the United States, which is considered high-quality, protein rich and more expensive, is generally uncompetitive.

The GOB does not accept a certificate from the country of export certifying weight and quality (e.g., FGIS' Official Export Inspection Certificate). This creates significant uncertainty for U.S. exporters as weight and quality are decided at final discharge. As a result, participation from U.S. traders in GOB tenders generally remains low. Canadian wheat is positioned well in the Bangladesh market, accounting for nearly 20 percent of imports.

Commodity:
Corn

Production:

Post's MY 2020/21 (May-April) planted corn area estimate is raised to 550,000 HA, and the production forecast estimate is up to 5.1 MMT assuming normal weather conditions during the season. The increase in production is the result of a growing demand for corn from Bangladesh's growing livestock, poultry and aquaculture feed sectors.

Post's MY 2019/20 (May-April) corn production estimate is unchanged at 4.7 MMT based on GoB official source data. The MY 2019/20 (May-April) winter corn will be harvested in March-April, 2020 and summer corn was harvested in June-July, 2019.

Bangladesh National Fall Armyworm Task Force reported that per the Ministry of Agricultural Extension Report, 4 percent of this year's corn crop was attacked by the Fall Armyworm (FAW) (*Spodoptera frugiperda*). The Ministry of Agriculture is not expecting significant yield loss due to FAW attack.

Price:

In March 2020, wholesale prices of corn were BDT 22 ($0.26) per kilogram, which is 14 percent higher than last year (Figure-3). The increase in price is partially due to an increase in global corn prices and lower imports into Bangladesh.

Consumption:

In MY 2020/21, total corn consumption is projected to grow 3.7 percent to 5.6 MMT. Expansion of the livestock and fisheries sectors have created further demand for corn, which is supplied by both imports and domestic production.

Corn demand in the feed industry will be highly volatile in the upcoming MY 2020/21 as a result of COVID-19. The animal feed sector has started to report decreased demand as livestock and poultry operations slow in response to movement and other COVID-19 related restrictions. The poultry industry has estimated BDT 1150 crore (US$ 135 million) economic and financial loss due to COVID-19 pandemic. As official measures to combat the pandemic in Bangladesh are just now being implemented, it is still too early to properly analyze the total impact of COVID-19 on the poultry and livestock sectors. There are approximately 80,000 poultry farms in Bangladesh and approximately 8.5 million people employed in the poultry sector, second in size to only Bangladesh's ready-made-garment sector. The poultry sector supplies 36% of Bangladesh's total protein intake through meat and egg consumption. There are approximately 2 million aquaculture farms in Bangladesh and this number is increasing at 5.7 percent per year. The Government of Bangladesh is closely monitoring the livestock, poultry, and aquaculture sectors as the pandemic progresses to ensure there are no supply chain disruptions and the industry will continue to have access to the necessary inputs, including animal and aquaculture feed.

The demand for feed is largely met by domestic feed industries (96%), followed by imported feed (2%), and homemade mix (2%). There are 217 GOB registered feed mills and more than 275 unregistered mills in the country. The fully automated feed mills, and other small and medium feed mills produce 7.5 MMT of feed for the livestock sector, including poultry (3.61 MMT), cattle (2.22 MMT), and aquaculture (1.67 MMT).

Raw materials generally used for poultry feed production include maize (55-65 percent), soybean meal (20-25 percent), mustard oil cake (10-25 percent), and rice bran (10-20 percent).

Trade:

Post's MY 2020/21 corn import forecast is lowered to 1 MMT on assumption of higher domestic production and slow progress in the feed industry to recover from an economic loss in the poultry and feed industry sector as a result of COVID-19.

MY 2019/20 (May to April) corn import forecast is unchanged at 1.4 MMT due to competitive international prices and a growing ability for domestic production to meet demand. For MY 2018/19, Post estimate is revised down to 1.3 MMT on USDA official export data.

Bangladesh imports approximately 30 percent of its total consumption needs.

Stock:

There is no GoB official information for corn stocks. The GOB does not procure corn locally. There are no corn producers or trader's associations to share stock information at the producer or wholesale level.

Table 3. Bangladesh: Commodity, milled rice, PSD
(Area in Thousand Hectares, Quantity in Thousand Metric Tons)

Rice, Milled	2018/2019		2019/2020		2020/2021	
Market Begin Year	May 2018		May 2019		May 2020	
Bangladesh	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	11,770	11,770	11,830	11,830	0	11,800
Beginning Stocks	1,500	1,500	1,405	1,405	0	1,466
Milled Production	34,909	34,909	35,850	35,850	0	36,300
Rough Production	52,369	52,369	53,780	53,780	0	54,455
Milling Rate (.9999)	6,666	6,666	6,666	6,666	0	6,666
MY Imports	400	400	60	15	0	200
TY Imports	80	80	30	180	0	100
TY Imp. from U.S.	0	0	0	0	0	0
Total Supply	36,809	36,809	37,315	37,270	0	37,966
MY Exports	4	4	4	4	0	4
TY Exports	4	4	4	4	0	4
Consumption and Residual	35,400	35,400	35,800	35,800	0	36,300
Ending Stocks	1,405	1,405	1,511	1,466	0	1662
Total Distribution	36,809	36,809	37,315	37,270	0	37,966
Yield (Rough)	4.45	4.45	4.55	4.55	0	4.61

Note: Market Year (MY) – May to April and Trade Year (TY) – January to December

Table 4. Bangladesh: Commodity, wheat, PSD
(Area in Thousand Hectares, Quantity in Thousand Metric Tons)

Wheat	**2018/2019**		**2019/2020**		**2020/2021**	
Market Begin Year	**July 2018**		**July 2019**		**July 2020**	
Bangladesh	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Area Harvested	320	320	340	340	0	350
Beginning Stocks	2233	2233	1258	1258	0	1558
Production	1100	1100	1200	1200	0	1250
MY Imports	5100	5100	6500	6300	0	6400
TY Imports	5100	5100	6500	6300	0	6400
TY Imp. from U.S.	386	386	0	0	0	0
Total Supply	8433	8433	8958	8758	0	9208
MY Exports	0	0	0	0	0	0
TY Exports	0	0	0	0	0	0
Feed and Residual	275	275	300	300	0	350
FSI Consumption	6900	6900	7000	7000	0	7100
Total Consumption	7175	7175	7300	7300	0	7450
Ending Stocks	1258	1258	1658	1558	0	1958
Total Distribution	8433	8433	8958	8858	0	9408
Yield	3.4375	3.4375	3.5294	3.5294	0	3.5714

Note: Market Year (MY) and Trade Year (TY) – July to June

Table 5. Bangladesh: Commodity, corn, PSD
(Area in Thousand Hectares, Quantity in Thousand Metric Tons)

Corn	2018/2019		2019/2020		2020/2021	
Market Begin Year	May 2018		May 2019		May 2020	
Bangladesh	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	450	450	500	510	0	550
Beginning Stocks	187	187	122	122	0	572
Production	3500	3500	4000	4700	0	5100
MY Imports	1335	1335	1400	1400	0	1000
TY Imports	1358	1358	1400	1400	0	1000
TY Imp. from U.S.	1	1	0	0	0	0
Total Supply	5022	5022	5522	6222	0	6672
MY Exports	0	0	0	250	0	300
TY Exports	0	0	0	250	0	300
Feed and Residual	4600	4600	5100	5100	0	5200
FSI Consumption	300	300	300	300	0	400
Total Consumption	4900	4900	5400	5400	0	5600
Ending Stocks	122	122	122	572	0	772
Total Distribution	5022	5022	5522	6222	0	6672
Yield	7.78	7.78	8.00	9.22	0.00	9.27

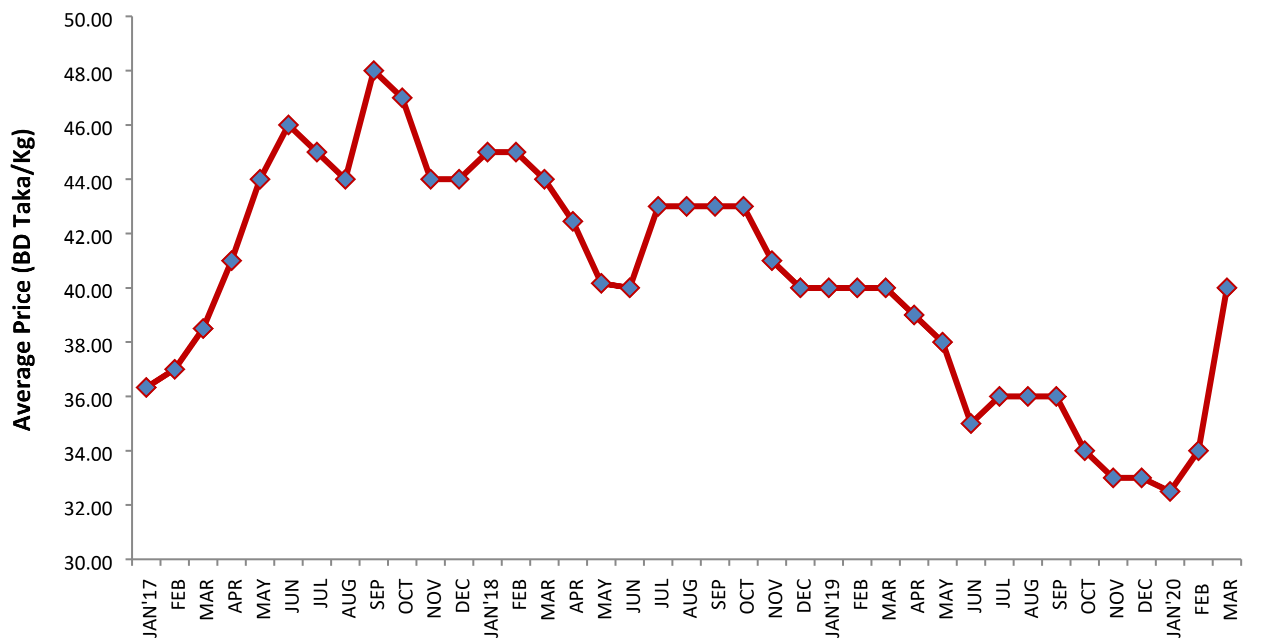
Note: Market Year (MY) – May to April and Trade Year (TY) – October to September

Table 6. Bangladesh: *Boro* rice competes with the alternative crops

General Crop Season	Rice Based Season	Competing Crops
Robi (Mid Oct – Mid Mar) Third Crop in Fiscal Year	*Boro Season Rice (Boro Rice)* Planting: Dec-Feb Harvesting: Apr-May	*Boro* season rice, potato, wheat, maize, sugarcane, cotton, mustard, lentils, onions, soybeans, groundnut, tobacco, and vegetables
Kharif-1 (Mid Mar – Mid Jul) First Crop in Fiscal Year	*Aus Season Rice (Aus Rice)* Planting Apr-May Harvesting: Jul-Aug	*Aus* season rice, jute, maize, mungbean, ginger, chili, onions, groundnuts and vegetables
Kharif-2 (Mid Jul – Mid Oct) Second Crop in Fiscal Year	*Aman Season Rice (Aman Rice)* Planting: Jul-Aug Harvesting: Nov-Dec	*Aman* season rice, cotton, jute, black gram, soybeans, and vegetables

Source: Crop Calendar of Krishi (Agriculture) Diary, Ministry of Agriculture
Note: Fiscal Year period is July - June and Marketing year for rice is May - April

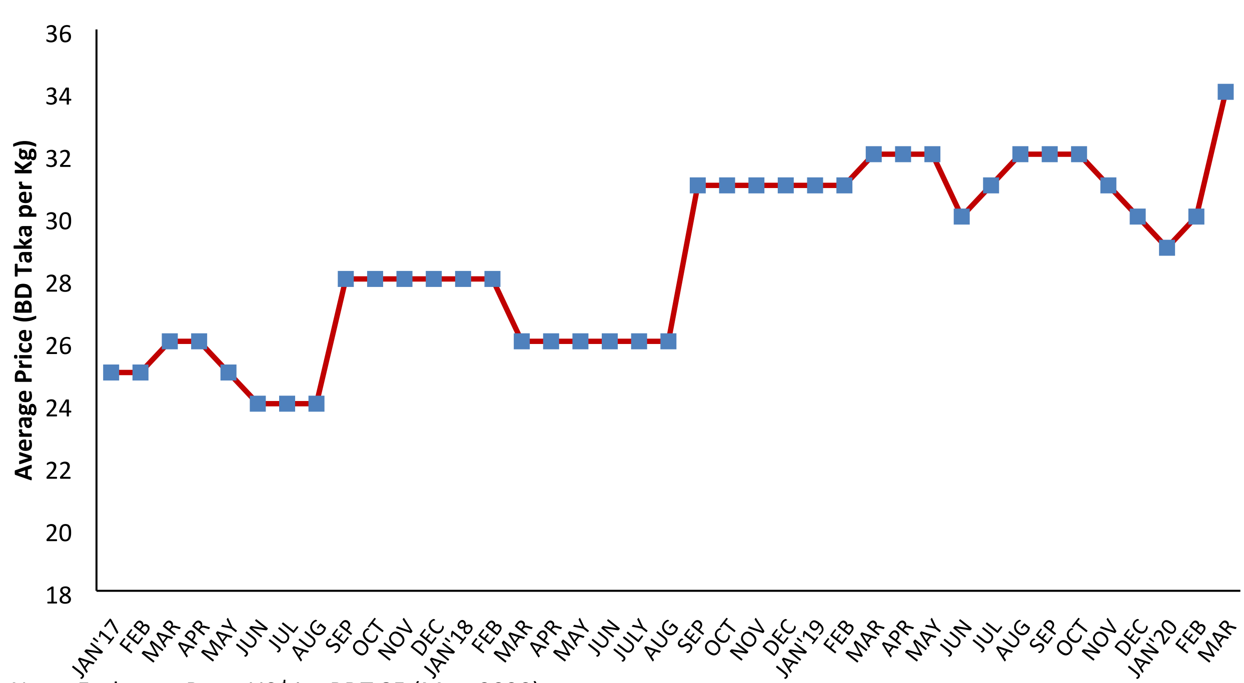
Figure 1. Bangladesh: Monthly average retail prices of coarse rice



Note: Exchange Rate, US$ 1 = BDT 85 (Mar, 2020)

Source: Trading Corporation of Bangladesh

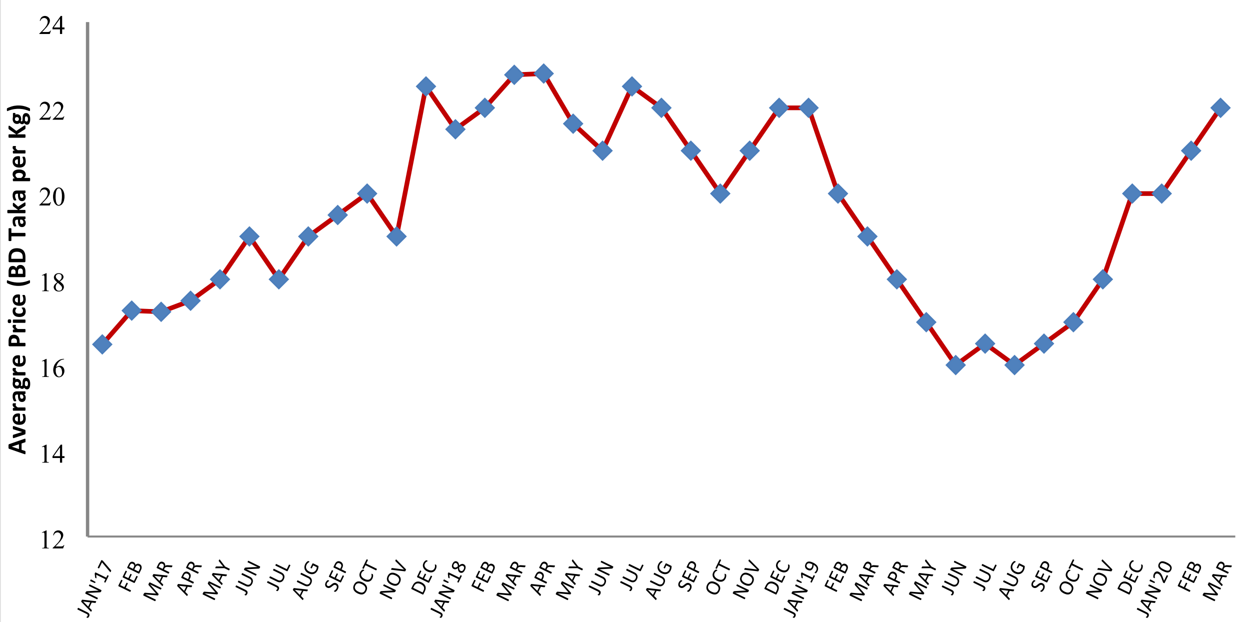
Figure 2. Bangladesh: Monthly average retail prices of wheat flour (Atta)



Note: Exchange Rate, US$1 = BDT 85 (Mar, 2020)

Source: Trading Corporation of Bangladesh

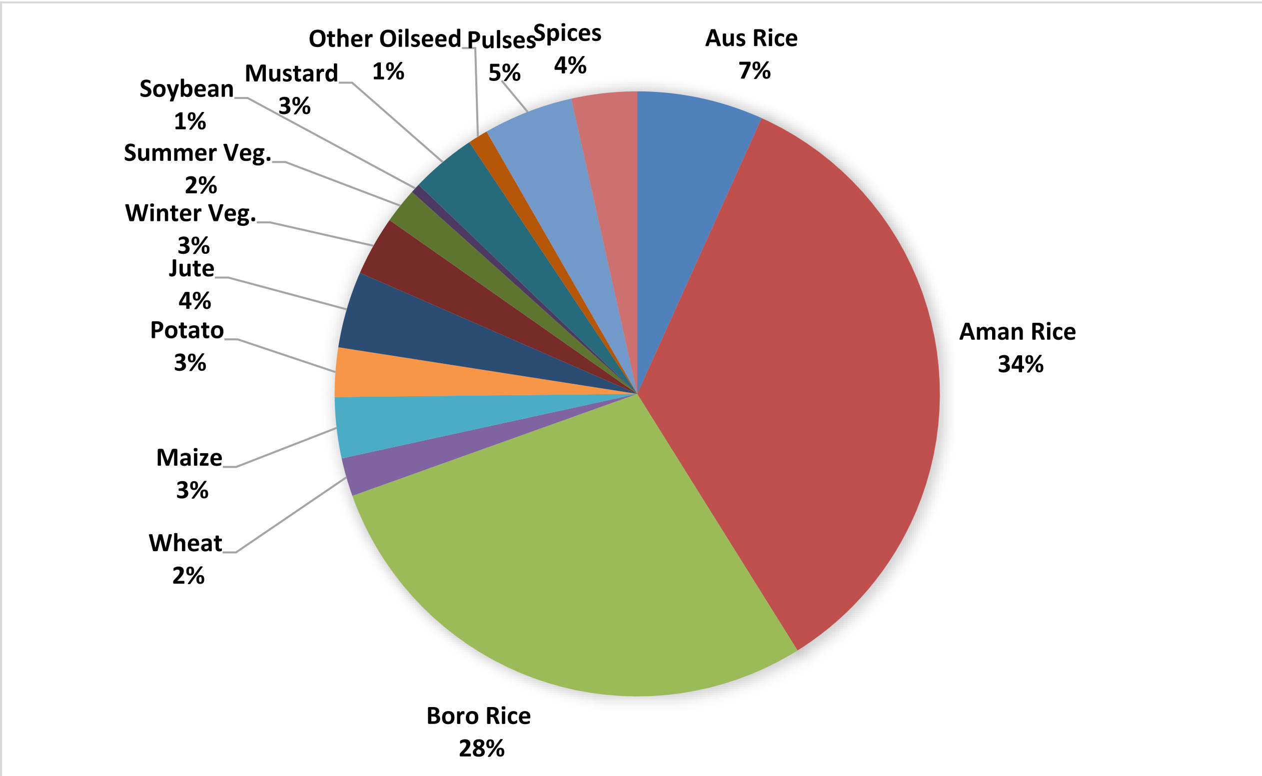
Figure 3. Bangladesh: Monthly average wholesale prices of corn



Note: Exchange Rate, US$ 1 = BDT 85 (Mar, 2020)

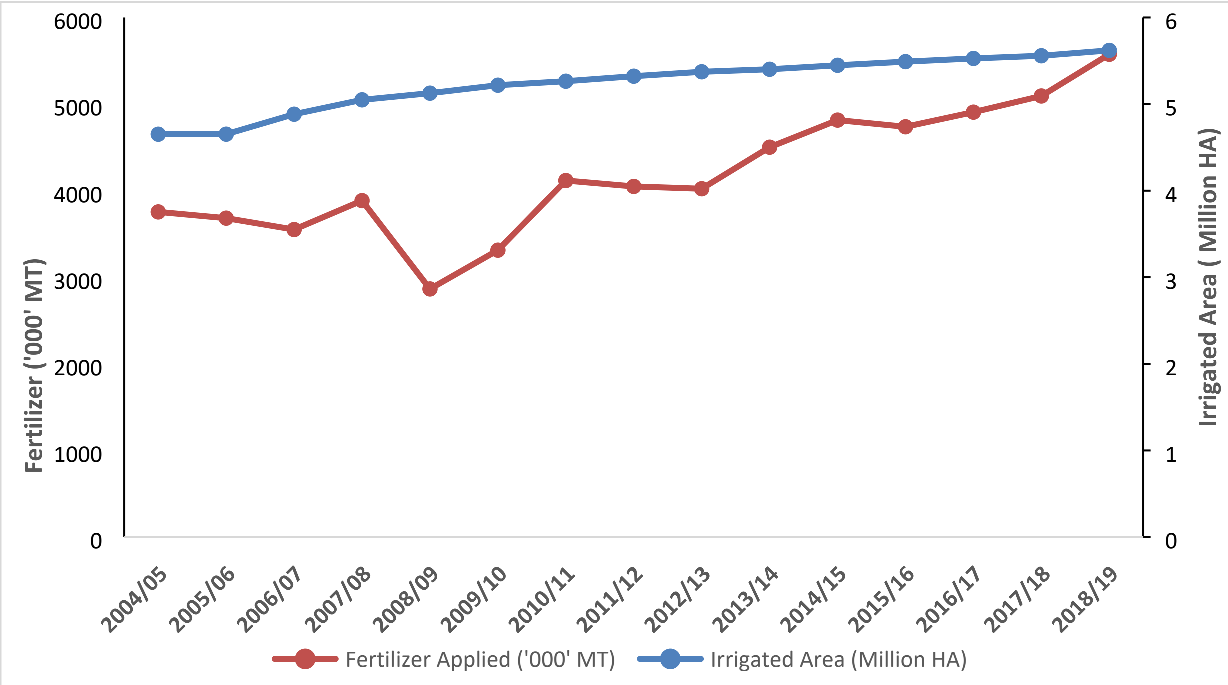
Source: Ministry of Agriculture

Figure 4. Bangladesh: Rice covers 69% of cultivated area



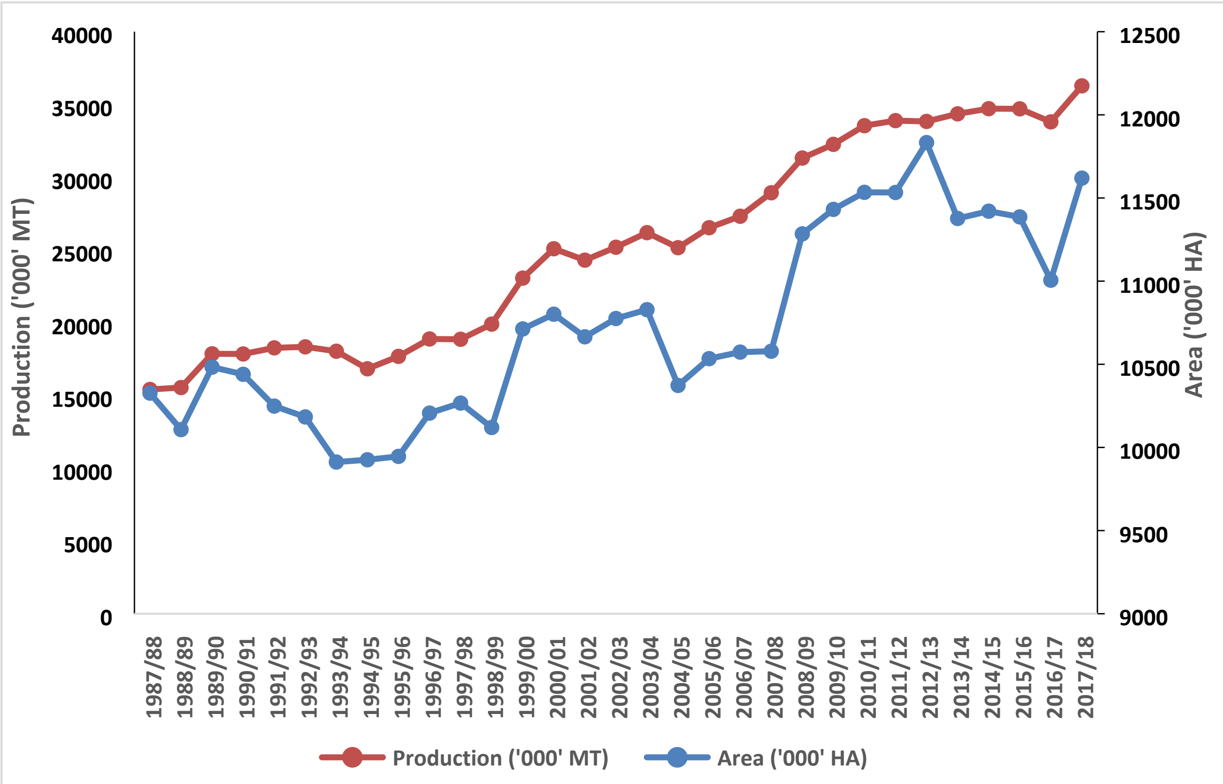
Source: Bangladesh Bureau of Statistics

Figure 5. Bangladesh: Fertilizer application and irrigated area



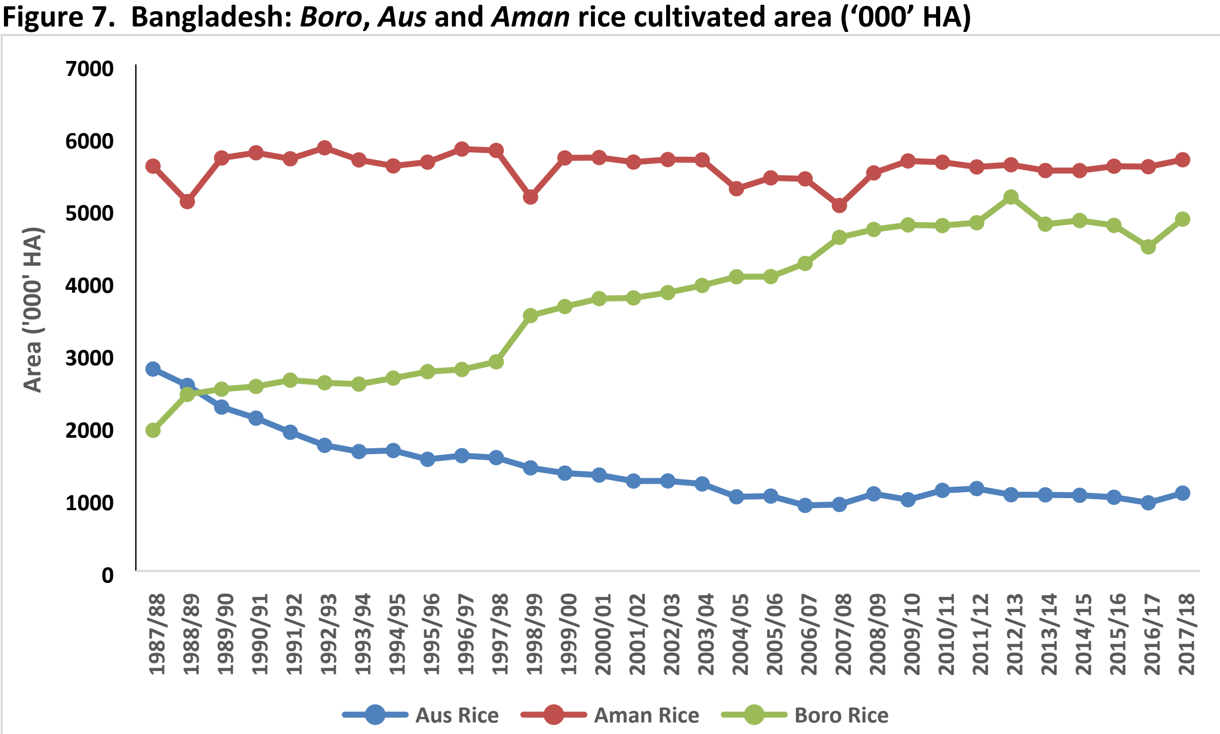
Source: Ministry of Agriculture

Figure 6. Bangladesh: Rice Area ('000' HA), and Production ('000' MT)



Source: Bangladesh Bureau of Statistics

Figure 7. Bangladesh: *Boro*, *Aus* and *Aman* rice cultivated area ('000' HA)



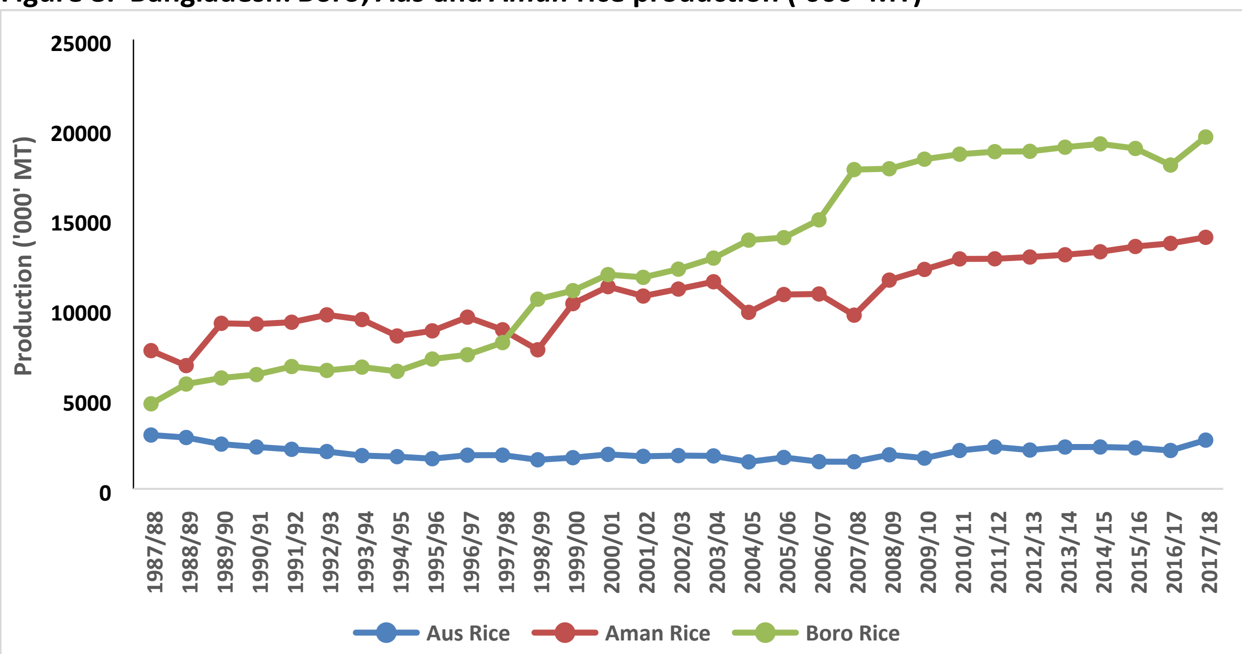
Source: Bangladesh Bureau of Statistics

Table 7. Bangladesh: Comparative financial profitability of rice on various planting season

Item	Aus Season Rice	Aman Season Rice	Boro Season Rice
Total cost (BDT/ha)	94,485	93,689	121,666
Total paid-out cost (BDT/ha)	66101	64393	89355
Total imputed cost (BDT/ha)	28384	29296	32311
Yield (kg/ha)	4341	4790	5720
Market value of paddy (BDT/ha)	75967.5	88615	102960
Gross benefit (BDT/ha)	82917	97964	107548
Gross margin (BDT/ha)	16816	33571	18193
Net return (BDT/ha)	-11569	4275	-14118
Unit price of grain (BDT/kg)	17.5	18.5	18
Unit cost of production (BDT/kg)	21.77	19.56	20.12
Benefit Cost Ratio (Gross Benefit/Total Cost)	1.25	1.52	1.20

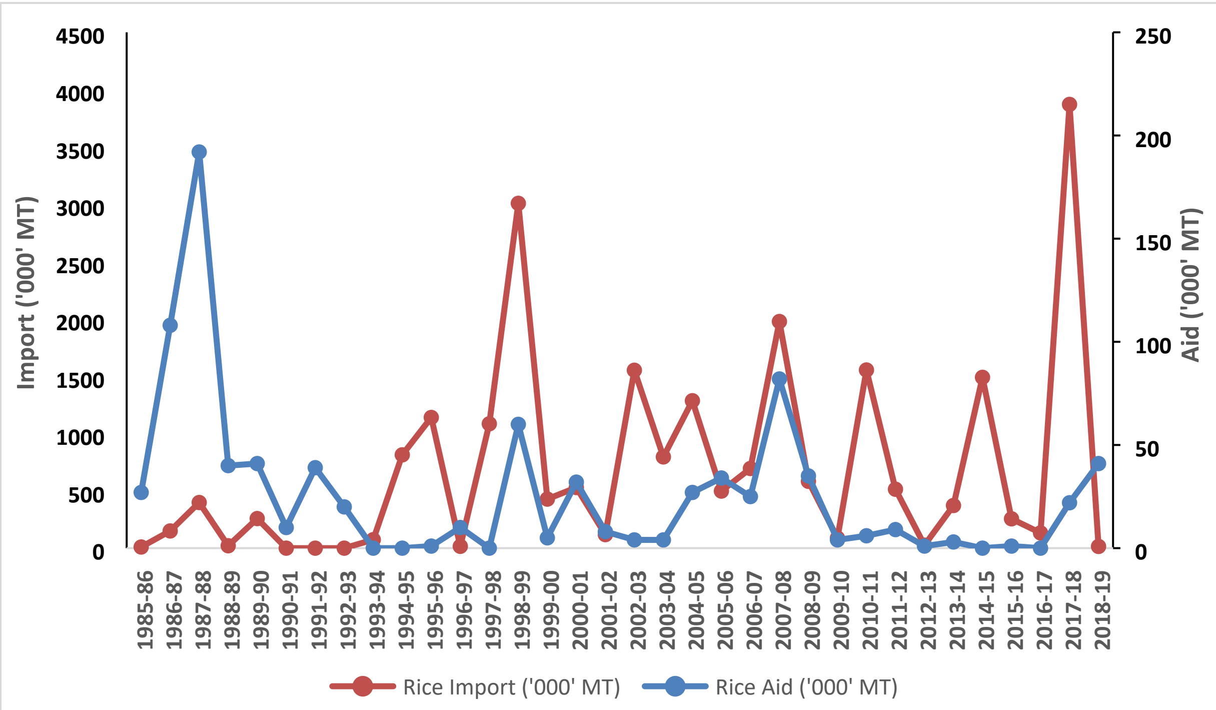
Source: Annual Research Report, 2018-19, Bangladesh Rice Research Institute

Figure 8. Bangladesh: *Boro*, *Aus* and *Aman* rice production ('000' MT)



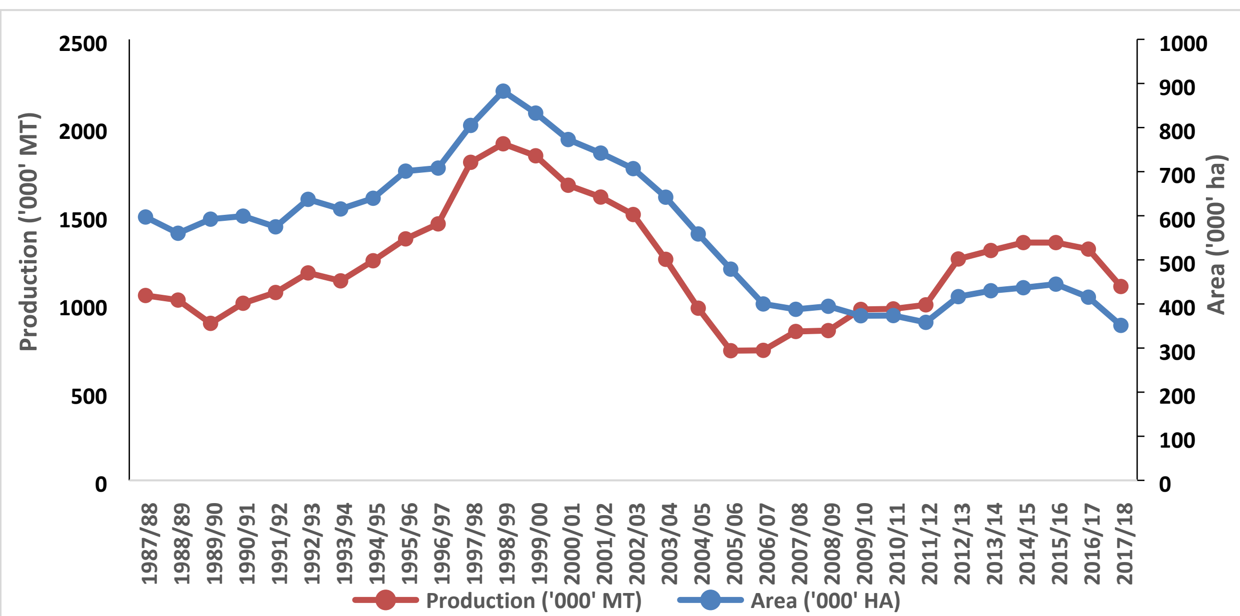
Source: Bangladesh Bureau of Statistics

Figure 9. Bangladesh: Rice Aid and Public-Private Import



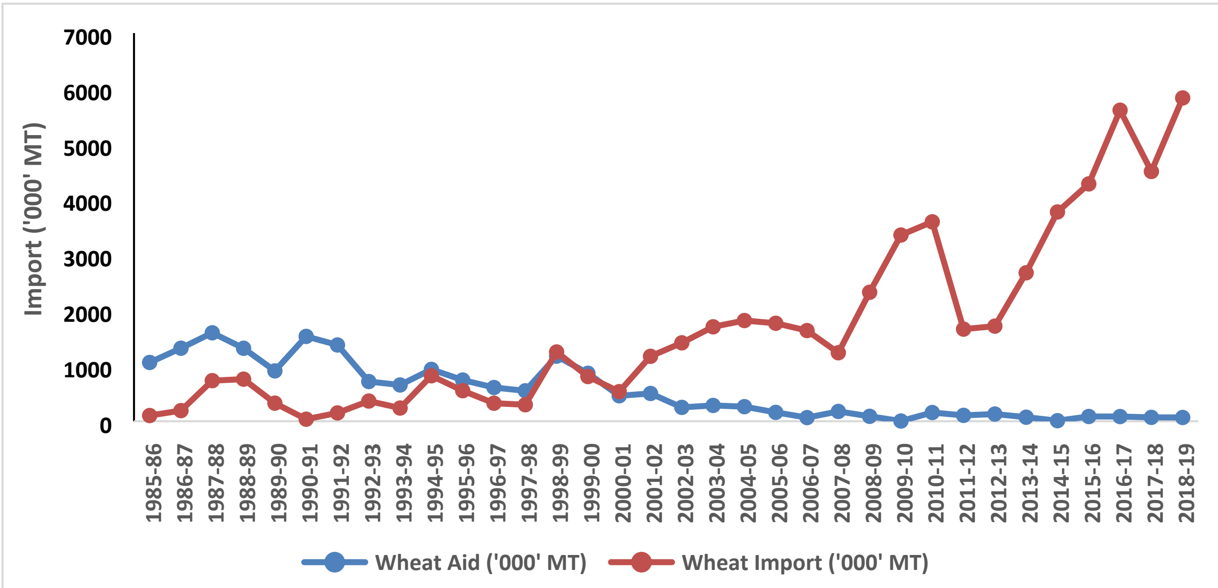
Source: Economic Review, Directorate of Food, Ministry of Food and Disaster Management.
Note: Includes private sector import side by side with public sector since 1992-93.

Figure 10. Bangladesh: Wheat cultivated area ('000' HA), and production ('000' MT)



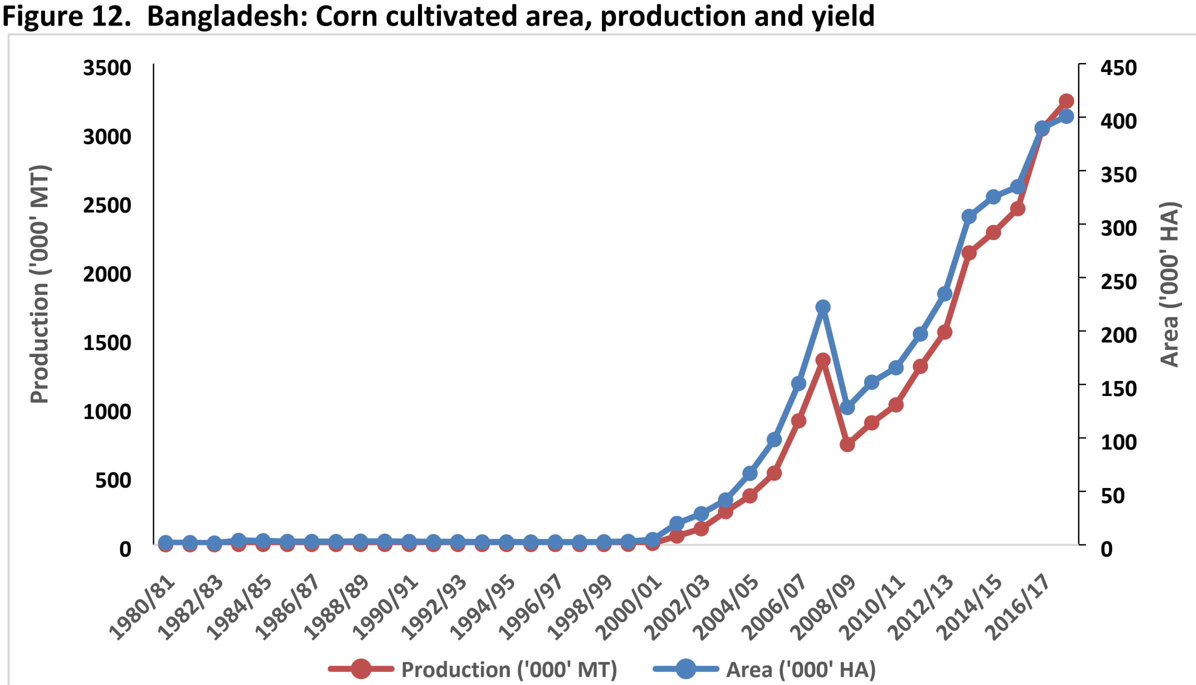
Source: Bangladesh Bureau of Statistics

Figure 11. Bangladesh: Wheat import as aid and public-private consumption



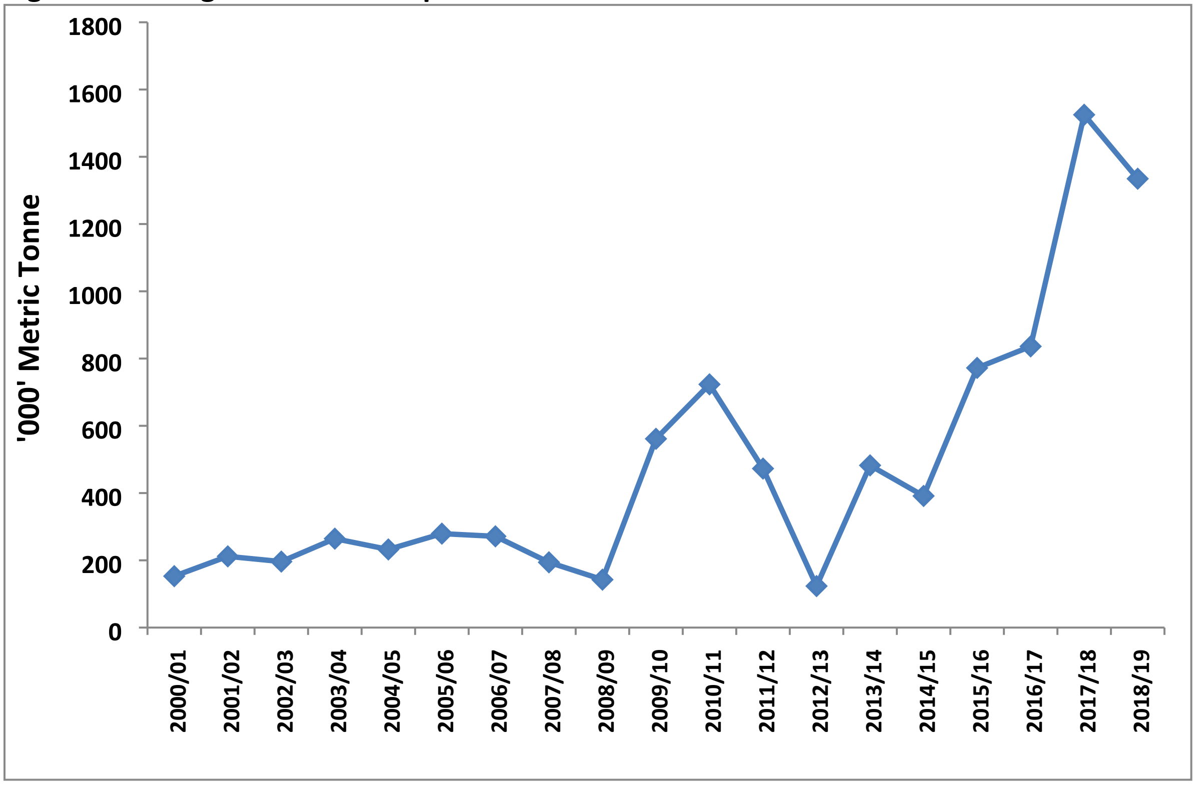
Source: Economic Review, Directorate of Food, Ministry of Food and Disaster Management.
Note: (1). Includes private sector import side by side with public sector since 1992-93.
(2). Including food aid wheat receipts for direct distribution by World Vision since 2000-01

Figure 12. Bangladesh: Corn cultivated area, production and yield



Source: Bangladesh Bureau of Statistics

Figure 13. Bangladesh: Corn import trend



Source: USDA

Table 8. Bangladesh: Distribution pattern of government held stock

Programs	2019-20 (July 1, 2019 - Mar 19, 2020)			2018-19 (July 1, 2018- 21 March, 2019)		
	Rice	Wheat	Total	Rice	Wheat	Total
Essential Priority (EP)	145041	93062	238103	143149	95283	238432
Other Priorities (OP)	12707	2406	15113	11704	2728	14432
Large Employee (LE)	1024	9829	10853	1567	9814	11381
Open Market Sale (OMS)	807	222234	223041	9031	197337	206368
Fair Price (Food friendly Program)	582078		582074	580263		580263
4th Class Staff						
Freedom fighter	628	536	1164	567	501	1068
Garments						
Other						
Sub-Total	782281	328091	1070372	746281	305664	1051945
Kabikha (Food for Work)	63382	21270	84652	65874	3781	69655
Test Relief (TR)	182		182			
Vulnerable Group feeding (VGF)	185454	1613	187067	220181		220181
Vulnerable Group Development (VGD)	259638		259638	242831		242831
School Feeding		1224	1224		1225	1225
Gratuitous Relief (GR)	41849	3	41492	27407		27407
Flood Affected (FA)						
Others	38999	19146	58145	95866	27520	123386
Sub-Total	589144	43256	632400	652159	32526	684685
Grand Total	1331425	371347	1702772	1398440	338190	1936630

Note: *Food friendly Program

Source: Director General of Food, Ministry of Food

Table 9: Bangladesh: Livestock population in Bangladesh

FY	Cattle	Buffalo	Sheep	Goat	Chicken	Duck	Total Poultry
	Million	Million	Million	Million	Million	Million	Million
2009-10	23.051	1.349	2.977	23.275	228.035	42.677	270.712
2010-11	23.121	1.394	3.002	24.149	234.686	44.12	278.806
2011-12	23.195	1.443	3.082	25.116	242.866	45.7	288.566
2012-13	23.341	1.45	3.143	25.277	249.011	47.254	296.264
2013-14	23.488	1.457	3.206	25.439	255.311	48.861	304.172
2014-15	23.636	1.464	3.27	25.602	261.77	50.522	312.293
2015-16	23.785	1.471	3.335	25.766	268.393	52.24	320.633
2016-17	23.935	1.478	3.401	25.931	275.183	54.016	329.2
2017-18	24.086	1.485	3.468	26.1	282.145	55.853	337.998
2018-19	24.238	1.486	3.537	26.267	289.283	57.752	347.035

Source: Department of Livestock

Table 10. Bangladesh: Contribution of Livestock and Poultry in the National Economy of Bangladesh (2018-19)(Provisional)

Contribution of Livestock in Gross Domestic Product (GDP) (Constant Prices)	1.47%
GDP growth rate of Livestock (Constant Prices)	3.47%
GDP volume (Current prices) (Crore Taka)	43212
Share of Livestock in Agricultural GDP (Current prices)	13.46
Employment (Directly)	20 %
Employment (Partly)	50 %

Source: Department of Livestock

Table 11. Bangladesh: Typical feed formula for broiler pellet feed

Types of Raw materials and ingredients	% by quantity
Maize	60%
Soybean	28%
Rice Polish (DOB)	5-7%
Oil	2%
DCP	1%
CaCO3	1.1%
Vitamin	2-5%
Minerals	0.2%
Methionine	0.2%
Lysine	0.1%
Toxin Binder	0.1%
Sodium bi Carbonate	0.1%

Source: Poultry industry market assessment - Bangladesh, US Soybean Export Council, 2017

Table 12. Bangladesh: Projected feed demand as per different sectors in poultry

Description	2014 (MT/Year)	2015 (MT/Year)	2020 (MT/Year)
Total DOC (Broiler)/Yr	1,036,800	1,140,480	2,000,504
Layer DOC	1,664,832	1,831,315	3,212,290
Commercial Layer + Broiler	**2,701,632**	**2,971,795**	**5,212,794**
PS (Broiler)	357,500	393,250	689,796
PS (Layer)	27,300	30,030	52,675
GP	7,800	15,600	27,364
Total DOC (PS+ GP)	**392,600**	**438,880**	**769,835**
Total (Broiler +Layer + PS+ GP)	**3,094,232**	**3,410,675**	**5,982,629**
Others (Sonali, Fayoumi, cock, country, etc.)	309,423	341,068	598,263
Total	**3,403,655**	**3,751,743**	**6,580,891**

Source: Feed demand Table, BPICC, November 2014

Table 13. Bangladesh: Requirement of feed ingredients (Projected)

Ingredients (Quantity in feed)	2014 (Million MT)	2015 (Million MT)	2020 (Million MT)
Corn/Maize (50-60%)	1.7 - 2.0	1.875 - 2.251	3.290 - 3.948
Meat & Bone meal (3-6%)	0.1 - 0.2	0.112 - 0.225	0.197 - 0.394
Soybean (25-30%)	0.85 - 1.0	0.937 - 1.125	1.645 - 1.974
DDGS (3-5%)	0.1 - 0.17	0.112 - 0.187	0.197 - 0.329
Seed Oil (1-2%)	0.034 - 0.068	0.037 - 0.075	0.065 - 0.131
DORB (3-5%)	0.1 - 0.17	0.112 - 0.187	0.197 - 0.329
Rice polish/bran (4-6%)	0.136 - 0.204	0.150 - 0.225	0.263 - 0.394
Limestone (1-2%)	0.034 - 0.068	0.037 - 0.075	0.065 - 0.131
Medicine (2-2.5%)	6.80 - 8.50	0.075 - 0.930	0.131 - 0.197
Oilseed cake (2-3%)	0.068 - 0.120	0.075 - 0.112	0.394
Others (6%)	0.24	0.225	0.394

Source: Feed requirement table, BPICC, November 2014

Table 14. Bangladesh: Production of fisheries sector

Fiscal Year	Capture (MMT)	Culture (MMT)	Marine (MMT)	Fish (MMT)	Growth (%)
2005-06	0.93	0.92	0.48	2.33	5.08
2006-07	0.98	0.98	0.49	2.44	4.79
2007-08	1.03	1.04	0.50	2.56	5.05
2008-09	1.09	1.10	0.51	2.70	5.39
2009-10	1.03	1.35	0.52	2.90	7.32
2010-11	1.05	1.46	0.55	3.06	5.60
2011-12	0.96	1.73	0.58	3.26	6.54
2012-13	0.96	1.86	0.59	3.41	4.55
2013-14	1.00	1.96	0.60	3.55	4.04
2014-15	1.02	2.06	0.60	3.68	3.84
2015-16	1.05	2.20	0.63	3.88	5.27
2016-17	1.16	2.33	0.64	4.13	6.60
2017-18	1.21	2.4	0.65	4.27	3.44

Source: Ministry of Fisheries and Livestock

Table 15. Bangladesh: Protein production

Fiscal Year	Milk	Meat	Egg
	Million MT	Million MT	Billion
2007-08	2.65	1.04	5.65
2008-09	2.29	1.08	4.69
2009-10	2.37	1.26	5.74
2010-11	2.95	1.99	6.08
2011-12	3.46	2.33	7.30
2012-13	5.07	3.62	7.62
2013-14	6.09	4.52	10.17
2014-15	6.97	5.86	10.99
2015-16	7.27	6.15	11.91
2016-17	9.28	7.15	14.93
2017-18	9.41	7.26	15.52
20818-19	9.923	7.514	17.11

Source: Ministry of Fisheries and Livestock

Table 16. Bangladesh: Daily per capita food intake

Food Item	2016	2010	2005	2000	1995-96	2016	2010	2005	2000
	Intake (gm)	Intake (gm)	Intake (gm)	Intake (gm)	Intake (gm)	Change (%)	Change (%)	Change (%)	Change (%)
Total	975.53	999.99	947.75	893.06	913.8	-2.45	5.51	6.12	-2.27
Rice	367.19	416.01	439.64	458.54	464.3	-11.74	-5.37	-4.12	-1.24
Wheat	19.83	26	12.08	17.44	33.7	-23.73	115.23	-30.73	-48.25
Potato	64.83	70.3	63.3	55.45	49.5	-7.78	11.06	14.16	12.02
Pulses	15.6	14.3	14.19	15.77	13.9	9.09	0.78	-10.02	13.45
Vegetables	167.3	166.08	157.02	140.47	152.5	0.73	5.77	11.78	-7.89
Edible oil	26.75	20.51	16.45	12.82	9.8	30.42	24.68	28.32	30.82
Onion	31.04	22	18.37	15.41	11.6	41.09	19.76	19.21	32.84
Beef	7.54	6.84	7.78	8.3	6.6	10.23	-12.08	-6.27	25.76
Mutton	0.55	0.6	0.59	0.49	1	-8.33	1.69	20.41	-51.00
Chicken/duck	17.33	11.22	6.85	4.5	4	54.46	63.80	52.22	12.50
Eggs	13.58	7.2	5.15	5.27	3.2	88.61	39.81	-2.28	64.69
Fish	62.58	49.5	42.14	38.45	43.8	26.42	17.47	9.60	-12.21
Milk & milk prod	27.31	33.72	32.4	29.71	32.6	-19.01	4.07	9.05	-8.87
Fruits	35.78	44.7	32.54	28.35	27.6	-19.96	37.37	14.78	2.72
Sugar/Gur	6.9	8.4	8.08	6.85	9.2	-17.86	3.96	17.96	-25.54
Fast food	30.77	29.83	24.76			3.15	20.48		
Miscellaneous	80.62	72.78	48.38	55.44	50.9	10.77	50.43	-12.73	8.92

Source: Bangladesh Bureau of Statistics, Household Income and Expenditure Survey, 2016

Table 17. Bangladesh: Growth of GDP and its contributing sector

Fiscal Year	GDP Growth (%)	Agriculture and Forestry (%)	Crops and Forestry (%)	Animal Farming (%)	Forest and Related Service (%)	Fisheries (%)
2005-06	6.67	5.44	6.17	2.15	5.46	5.75
2006-07	7.06	6.04	7	1.99	5.5	9.41
2007-08	6.01	3.87	3.98	2.21	5.26	7
2008-09	5.05	3.09	2.83	2.35	5.54	4.94
2009-10	5.57	6.55	7.57	2.51	5.34	4.6
2010-11	6.46	3.89	3.85	2.59	5.56	6.69
2011-12	6.52	2.41	1.75	2.68	5.96	5.32
2012-13	6.01	1.47	0.59	2.74	5.04	6.18
2013-14	6.06	3.81	3.78	2.83	5.01	6.36
2014-15	6.55	2.45	1.83	3.08	5.08	6.38
2015-16	7.11	1.79	0.88	3.19	5.12	6.11
2016-17	7.28	1.96	0.96	3.31	5.6	6.23
2017-18	7.86	3.47	3.06	3.4	5.51	6.37
2018-19	8.13	2.58	1.75	3.47	5.58	6.29

Source: Different national statistics publication

Table 18. Bangladesh: Industrial sector's GDP contribution growth

FY	GDP Growth (%)	Manufacturing (%)	Large and Medium scale (%)	Small scale (%)
2005-06	6.67	10.81	11.24	9.14
2006-07	7.06	10.54	10.8	9.48
2007-08	6.01	7.33	7.38	7.15
2008-09	5.05	6.69	6.54	7.3
2009-10	5.57	6.65	6.27	8.17
2010-11	6.46	10.01	11.11	5.67
2011-12	6.52	9.96	10.76	6.58
2012-13	6.01	10.31	10.65	8.81
2013-14	6.06	8.77	9.32	6.33
2014-15	6.55	10.31	10.7	8.54
2015-16	7.11	11.69	12.26	9.06
2016-17	7.28	10.97	11.2	9.82
2017-18	7.86	13.4	14.26	9.25
2018-19	8.13	14.73	15.61	10.26

Source: Different national statistics publication

Table 19. Bangladesh: Development indicator's progress

FY	Investment (% GDP)			Per Capita Income (US$)	Power Generation Capacity (Megawatt)	Food Grain Production (MMT)	Average Inflation
	Public	Private	Total				
2005-06	5.56	20.58	26.14	543	5245	27.27	
2006-07	5.09	21.08	26.17	598	5202	28.06	9.4
2007-08	4.5	21.7	26.2	686	5305	35.29	12.3
2008-09	4.32	21.89	26.21	759	5719	34.71	7.6
2009-10	4.67	21.57	26.24	843	5823	35.81	6.8
2010-11	5.26	22.16	27.42	928	7264	36.07	10.9
2011-12	5.76	22.5	28.26	955	8716	36.88	8.7
2012-13	6.64	21.75	28.39	1054	9151	37.27	6.8
2013-14	6.55	22.03	28.58	1184	10416	38.17	7.4
2014-15	6.82	22.07	28.89	1317	11534	38.42	6.4
2015-16	6.66	22.99	29.65	1465	14429	39.0	5.9
2016-17	7.26	23.01	30.27	1602	15379	39.69	5.4
2017-18	7.97	23.26	31.56	1751	15953	41.32	5.8
2018-19	8.17	23.4	31.56	1823	18079		5.44

Source: Bangladesh official statistics from various bureaus

Table 20. Bangladesh: Socio-economic progress at household level

Parameter	HIES 2016			HIES 2010		
	Total	Rural	Urban	Total	Rural	Urban
Calorie (k. cal/capita/day)	2210.4	2240.2	2130.7	2318.3	2344.6	2244.5
Protein (gm/capita/day)	63.8	63.3	65	66.26	65.24	69.11
Income (US$/household/month)	202	169	286	166	140	239
Income (US$/capita/month)	50	41	73	37	31	54
Consumption per household (US$/month)	195	176	245	159	137	221
Expenditure per household (US$/month)	199	179	249	162	139	225
Credit taken per household (US$)	478	397	756	407	316	784
Access to household electricity (%)	75.92	68.85	94.01	55.26	42.49	90.1
Beneficiaries in Social safety net program (%)	28.7	35.7	10.9	24.6	30.1	9.4

Source: Bangladesh Bureau of Statistics

Table 21. Bangladesh: CPI and Food, Non-Food inflation (All Rural)

	Index			Inflation (point to point)		
FY	**General**	**Food**	**Non-Food**	**General**	**Food**	**Non-Food**
2005-06	100	100	100			
2006-07	109.39	111.63	106.51	9.39	11.63	6.51
2007-08	122.84	130.3	113.27	12.3	16.72	6.35
2008-09	132.17	140.61	121.36	7.6	7.91	7.14
2009-10	141.18	149.4	130.66	6.82	6.25	7.66
2010-11	156.59	170.48	138.77	10.92	14.11	6.21
2011-12	170.19	183.65	152.94	8.69	7.73	10.21
2012-13	181.73	193.24	166.97	6.78	5.22	9.17
2013-14	195.08	209.79	176.23	7.35	8.56	5.55
2014-15	207.58	223.8	186.79	6.41	6.68	5.99
2015-16	219.86	234.77	200.66	5.92	4.9	7.43
2016-17	231.82	248.9	209.92	5.44	6.01	4.61
2017-18	245.22	266.64	217.76	5.78	7.13	3.74

Source: Economic Review, Ministry of Finance

Table 22. Bangladesh: Area for development identified in Seventh Five Year Plan (FY 2016-2020)

Crops	Livestock	Fisheries	Cross cutting issues
Creating opportunities for Sustainable agriculture and green growth	Dairy and poultry development	Open water fisheries management	Weather prediction and forecasting
Application of science and technology for higher levels of food production	Meat production	Inland aquaculture	Research, gender and HRD
Agricultural research	Breed development	Shrimp and coastal aquaculture	Pest disease management and bio-control of pest
Crop zoning and Land use planning	Livestock research	Marine fisheries and exploring blue economy	Agriculture credit
Agricultural inputs-seeds and fertilizers	Veterinary services and animal health		Value chain development
Promotion of precision agriculture	Feeds, fodder and animal management		Boosting agro-processing industries
Promoting agriculture diversification and expansion of horticulture crop	Hides and skins		Mainstreaming women in agriculture
Use of water resource and water economy			Seaweeds as foods and for disease control
Farm mechanization			
Good agriculture practice			

Attachments:

No Attachments