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Report Name: Grain and Feed Annual

Country: Bangladesh

Post: Dhaka

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Report Highlights:

For the market year (MY) 2021/22 (May-April), Post forecasts Bangladesh's rice production to increase, assuming friendly weather and increased yield. Rice imports are expected to fall as a result of increased domestic production. Wheat production is projected lower 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 the improved quality of domestic corn.

Executive Summary:

For MY 2021/22 (May-April), the total rice area is projected to increase slightly to 11.6 million hectares (HA) and production is projected to increase to 35.8 million metric tons (MMT), assuming favorable weather and increased yield due to further cultivation of hybrid and high yield varieties (HYV). MY 2020/21, total rice area and production are revised down to 11.5 million HA and 34.6 MMT according to official data from the Ministry of Agriculture (MOA). MY 2021/22 rice imports are expected to decrease to 500,000 MT from 800,000 MT in MY 2020/21. MY 2021/22 wheat area and production are forecast downward to 320,000 HA and 1.1 MMT based on farmers' preference to grow corn because of current low wheat margins. In MY 2021/22, corn area and production are forecast upward to 575,000 HA and 5.2 MMT as a result of strong and sustained domestic demand. For MY 2021/22, corn imports are forecast downward to 1.5 MMT because of increased domestic production.

Commodities:
Rice Milled

Production:
For MY 2021/22 (May-April), total rice area and production levels are forecasted to increase 1.3 percent to 11.6 million hectares (HA) and 3.5 percent to 35.8 million metric tons (MMT), assuming favorable weather conditions, sufficient supply of seed and fertilizers, proper irrigation, and continued support from the Ministry of Agriculture (MOA) Department of Agriculture Extension (DAE). Domestic demand for rice continues to be strong, which has driven market prices upwards.

The MY 2021/22 (May-April) starts with the harvest of Bangladesh's *Boro* season rice, which began in late April and will continue for the next month (i.e., May). In early April, FAS Dhaka contacted *Boro* rice farmers from various parts of Bangladesh and the farmers reported an expectation of a bumper crop this year. Though, some farmers reported damage caused by a short heat wave in the first week of April. The MOA is in the process of estimating the full extent of the production loss caused by the heat but the preliminary estimation is 200,000 MT (link). FAS Dhaka forecasts a 2.5 percent loss of *Boro* rice production due to heat stress, and other factors (e.g., pests). As a result of the heat, key industry contacts believe it may be difficult for Bangladesh to achieve the MOA's target of producing 20.5 MMT of *Boro* rice this market year. *Boro* accounts for approximately 50-55 percent of annual rice production.

The Government of Bangladesh (GOB) continues to encourage farmers to produce hybrid and high yield rice varieties (e.g., BRRI Dhan-50, 54, 84). The GOB allocated BDT 730 Million (US $8.6 million) towards the supply of hybrid seed varieties as well as fertilizers to increase domestic production in hopes of reducing domestic rice prices. The COVID-19 pandemic and its associated lockdown measures have led to consumers stocking personal allocations of rice, thereby driving up domestic prices. Speculation in the market is also driving up prices. The high prices have led to greater returns for farmers but the farmers are faced with rising labor costs so this year's farmer profit increases are minimal.

Weather conditions over the next month will be important to monitor. Farmers were late to plant this year's *Boro* rice crop so the upcoming monsoon season could dramatically impact this year's harvest. Approximately 50 percent of *Boro* rice will be harvested by the second week of May, which is when the monsoon season is expected to start. In 2020, Cyclone Amphan formed on May 16 and dissipated May 21.

Bangladeshi farmers produce rice in three distinct seasons (*Boro, Aus, Aman*). Though farmers are slowly diversifying their land from rice to other cereals or non-cereal crops, the majority of farmers still prefer to produce rice because it is a staple in the Bangladeshi diet, farmers are accustomed to rice growing practices, and the GOB offers support programs. Bangladeshi farmers have expressed increased interest in growing higher-margin crops like corn, potato, or vegetables during the winter (*Boro*) season. 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. The *Boro* and *Aman* rice seasons are capable of having an impact on domestic market prices throughout the year.

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

Rice by Season	2019/20 (Estimate)		2020/21 (Estimate)		2021/22 (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)	4,850	19,400	4,700	19,300	4,700	19,000
Aus (Pre Monsoon)	1,100	2,450	1,200	2,700	1,250	2,820
Aman (Monsoon)	5,880	14,000	5,600	12,600	5,700	14,000
Total Rice	11,830	35,850	11,500	34,600	11,650	35,820

***Note:** Boro season rice (Boro rice) is planted in 2020 and harvested and marketed in April-May, 2021. Boro rice is therefore the first rice crop in the Market Year (MY) 2021-22 (May-April).*

Consumption:

MY 2021/22 (May-April) rice consumption is forecast to increase to 36 MMT, up 0.3 percent from MY 2020/21 based on an expectation of continued government food assistance programs for poor households impacted by COVID-19 lockdowns. Further, as Bangladesh recovers from the pandemic, restaurants, hotels, and business cafeterias are expected to resume operations. The one percent increase in Bangladesh's population will also impact annual consumption but only slightly as per capita consumption of rice has been steadily declining for the last two decades.

MY 2020/21 (May-April) rice consumption forecast has been increased to 35.9 MMT as a result of the GOB lifting the first phase of lockdown restrictions in May 2020 and the economy somewhat recovering in the third and fourth quarters of calendar year (CY) 2020. A small percentage of the increase in consumption is driven by a growing demand for rice bran oil and broken rice. Bangladesh's feed industry is increasingly using broken rice as a filler in various feed formulas.

Trade:

Rice imports in MY 2021/22 are forecasted down to 500,000 MT in anticipation of a strong harvest in the MY 2021/22 *Boro* season. Continued encouragement from the GOB to increase domestic production and high domestic prices are expected to result in increased rice production in the upcoming Aus and Aman season, as well.

Last year, in a move to allow rice imports in hopes of driving down high domestic prices, the GOB announced a reduction of the rice import tariff. The reduction was originally scheduled to end on April 30, 2021 when the GOB planned to reevaluate the tariff based on market prices, stock levels, and domestic production. While the GOB has not yet announced what it intends to do with tariff, FAS Dhaka believes the reduction will be in place until COVID-19 concerns are addressed and the market returns to normal levels.

Rice imports in MY 2020/21 are forecast at 800,000 MT, which is s slight increase over FAS Dhaka's previous forecast. The increase is the result of FAS Dhaka collecting updated month-wise import data for the current marketing year. Per the food directorate, as of April 12, Bangladesh imported 0.8 million MT of rice, of which 0.24 million MT was bought through a government procurement process. Late last year, the GOB approved 320 importers to import 1 MMT rice but a number of the procurement orders went unfilled as a result of high international market prices and high trade costs. The GOB recently approved an import order of 0.15 MMT of rice from India.

The rice imported into Bangladesh is largely Basmati rice for upper class consumers. Non-Basmati coarse rice (Parboiled and Non-Parboiled) is also imported when local rice price is comparatively higher than neighboring producers.

Stocks:

According to the Ministry of Food (MOF), as of April 12, 2021, public rice stocks are at 0.4 MMT, which is approximately 70 percent lower than this time last year.

The GOB was not able to fulfill its intended MY 2020/21 Aman rice procurement goal because farmers elected to sell on the local market instead of through the public procurement process. The Ministry of Food (MOF) on April 22, 2021, announced its procurement plan for the upcoming *Boro* rice harvest. The MOF plans to procure 1 MMT of *Boro* parboiled rice for BDT40 (US$0.47) a kilogram, 150,000 MT of *Boro* atap (non-boiled) rice for BDT39 (US$0.45) a kilogram, and 650,000 MT of paddy (unhusked rice) for BDT28 (US$0.31) a kilogram and 0.1 MMT of wheat for BDT28 (US$0.32). The *Boro* milled rice procurement of this year's harvest is similar to last year, but unmilled rice procurement is approximately 18.75 percent lower than last year.

In the FY 2020/21, The GoB distributed 1.3 MMT tons of rice to people under the food distribution program.

From July 2020 to March 2021, the GOB procured 12,342 MT of *Aman* rice (Unhusked/unmilled rice) at BDT26 (US0.31) per kilogram from the farmers and 74,999 MT of *Aman* rice (husked/milled) from the millers for state reserves. 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)

12-Apr-21			12-Apr-20		
Rice (000 MT)	Wheat (000 MT)	Total (000 MT)	Rice (000 MT)	Wheat (000 MT)	Total (000 MT)
371.71	110.25	481.96	1212.64	280.91	1493.55

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

Prices:

In April 2021, the retail coarse rice prices were BDT48 ($0.57) per kilogram, which is 22 percent higher than the same month last year (Figure 1). The fine rice price was BDT60 ($0.70), 25 percent higher than coarse rice. As a result of the large difference in price, Bangladesh's middle income consumers are likely to purchase coarse rice for home consumption.

Retail prices for rice have continued to increase over the last 11 months, reflecting reduced local supply due to low MY2020/21 production. Further, millers, wholesales, and consumers are stocking larger than average amounts of rice in expectation of continued price increases. FAS Dhaka forecasts the price of rice to start decreasing soon after *Boro* rice harvest.

Policy:

The second phase of Bangladesh's COVID-19 lockdown started on April 14, 2021 and is expected to limit urban transportation but is not expected to have a large impact on Bangladesh's rice production.

In an effort to support Bangladesh's households most affected by COVID-19, the GOB has announced a program to provide cash aid for 3.6 million poor families and food aid to 12.3 million people during the lockdown (link). Rice will be a major component of the GOB's food aid program.

The Ministry of Agriculture (MOA) has also allocated BDT 3,200 million (US$ 37.64 million) over the 2021-2025 time period for the distribution of 52,000 units of farm equipment to support the development of modern agriculture practices (link). The subsidy will cover 50 percent of the cost for certain equipment (e.g., combine harvester) for farmers and 70 percent of the price for farmers in the Haor areas. The machinery, if purchased, would enable farmers to become more efficient and reduce their dependence on a large labor force during harvest season. The farm mechanization project started in 2009.

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:
Wheat is the third largest cereal crop produced in Bangladesh after rice and corn. FAS Dhaka forecasts MY 2021/22 wheat harvest area down 4.5 percent to 320,000 HA due to decreased demand and weak farmer interest to produce wheat as other higher-margin crops (e.g., corn) are becoming popular. Farmers reported concerns about the difficulty of successfully growing wheat in Bangladesh, citing wheat's sensitivity to weather changes and strict planting seasons. Rodent infestation is also a common problem faced by Bangladesh's wheat farmers.

FAS Dhaka forecasts MY 2021/2022 wheat production at 1.1 MMT, assuming favorable weather conditions and expanded use of high yield varieties.

The MY 2020/21 (July – June) wheat production estimate is unchanged. Farmers have expressed optimism about this year's crop, stating wheat blast was not as big of a concern this year relative to previous crops.

Imports:
In MY 2021/22 (July-June), wheat imports are forecast upward by 8.33 percent to 6.5 MMT with an expectation of a continued increase in wheat use in diversified products (e.g., baking shops, food processing), a growing demand for wheat-based products, and the government's efforts to build wheat stocks for food aid programs.

In CY 2020, major wheat suppliers included Russia (32 percent), Ukraine (25 percent), Canada (19 percent), and the United States (5 percent).

FAS Dhaka estimates MY 2020/21 (July – June) wheat imports down by 9 percent to 6 MMT compare to the USDA official figure as lower monthly import trends are observed from July 2020 to February 2021. Over the July to February timeframe, Bangladesh imported 4.4. MMT, which is 18.5 percent lower than the same time period in MY 2019/20.

Consumption:
FAS Dhaka has increased its MY 2021/22 wheat consumption forecast 1.4 percent to 7.75 MMT based on a steady increase in consumer demand as well as continued feed usage. The developing food-processing industry in Bangladesh continues to grow, especially in the shelf-stable bread and biscuit sector.

Stocks:
According to the Ministry of Food (MOF), as of April 12, 2021, public wheat stocks are estimated at 110,000 MT, which is 60.8 percent lower than last year. To keep consistent stock levels, the GOB imported 285,320 MT of wheat in the period July 2020 – April 2021, which is 22 percent lower than last MY 2019/20 (July-June). The GOB has been closely monitoring stock levels throughout the COVID-19 pandemic. The government may need to import and locally purchase wheat at the end of the current

market year as stocks are low. The GOB has the capacity to stock 2 MMT of rice and wheat. There is no public information on private stock capacity.

The Ministry of Food (MOF) did not announce its procurement plan for the recent wheat harvest. During MY 2019/20, the MOF procured 64,429 MT of wheat.

Prices:
In April 2021, the average retail price of wheat flour (*atta*) was BDT 31 (US$0.36) per kilogram (See Figure 2), which is 8.82 percent lower than the same month last year.

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 remain low.

Commodity:
Corn

Production:

Farmers currently prefer to produce corn over other crops because of consistent prices and favorable yields. FAS Dhaka's MY 2021/22 (May-April) corn area harvested forecast is raised by 4.55 percent to 575,000 HA, and the production forecast estimate is up to 5.2 MMT, assuming favorable weather conditions and lower levels of insect and pest infestation during the winter and summer seasons. The increase in production is the result of a growing demand for corn from Bangladesh's growing livestock, poultry and aquaculture feed sectors.

The GOB has set a lofty goal of producing 10 MMT of corn by 2025 (link). As such, the research and development community has started to also look at opportunities to produce corn by-products, including corn oil and corn starch.

FAS Dhaka has revised its MY 2020/21 (May-April) corn production area up by 7.8 percent to 550,000 HA based on updated winter corn planting data from the MOA. The MY 2020/21 (May-April) winter corn harvest started and based on preliminary field reports, FAS Dhaka has revised the production estimate to 4.7 MMT, 2.2 percent higher than Post's and USDA official estimates. Fall Armyworm (FAW) did not greatly impact winter corn production. The latest FAW monitoring map (link) does not highlight Bangladesh as an FAW affected country as of May 2021 (link).

Price:
In April 2021, farmgate prices of corn were BDT 20 ($0.24) per kilogram, which is 4.8 percent lower than last year, but still favorable to local farmers (Figure-3). The price decrease is partially due to the start of domestic harvest and slower demand from the feed industry for domestic corn as imports increased by 69 percent during the May to February timeframe relative to the same period of last MY.

Consumption:
In MY 2021/22, total corn consumption is projected to grow 4.8 percent to 6.6 MMT due to the increased demand for feed to supply expanding livestock and fisheries sectors. FAS Dhaka expects the livestock sector to slowly recover as demand for poultry, beef, dairy, and aquaculture return to pre-pandemic levels. While the current COVID-related lockdown is impacting consumption patterns, recent trends have shown slight improvements and Post optimistically expects the economy to slowly reopen in the next marketing year.

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 percent 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 (70%), followed by imported feed (5%), and homemade mix (25%). 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 2021/22 corn import forecast is lowered to 1.5 MMT on an assumption of higher quality domestic production. The quality of the corn crop in MY 2020/21 was reported to be below average, so feed mills turned to the international market. Feed mills will likely return to sourcing from the domestic market if the quality improves to normal levels.

MY 2020/21 (May to April) corn import forecast has been increased to 2.3 MMT due to increased demand for quality (i.e., higher protein levels) corn that is required in the feed industry.

Bangladesh imports approximately 30-40 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	2019/2020		2020/2021		2021/2022	
Market Year Begins	May 2019		May 2020		May 2021	
Bangladesh	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	11830	11830	11600	11500	0	11650
Beginning Stocks (1000 MT)	1405	1405	1771	1771	0	1267
Milled Production (1000 MT)	35850	35850	34800	34600	0	35820
Rough Production (1000 MT)	53780	53780	52205	51905	0	53735
Milling Rate (.9999) (1000 MT)	6666	6666	6666	6666	0	6666
MY Imports (1000 MT)	20	20	800	800	0	500
TY Imports (1000 MT)	20	20	1300	1000	0	500
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	37275	37275	37371	37171	0	37587
MY Exports (1000 MT)	4	4	4	4	0	4
TY Exports (1000 MT)	4	4	4	4	0	4
Consumption and Residual (1000 MT)	35500	35500	35900	35900	0	36000
Ending Stocks (1000 MT)	1771	1771	1467	1267	0	1583
Total Distribution (1000 MT)	37275	37275	37371	37171	0	37587
Yield (Rough) (MT/HA)	4.5461	4.5461	4.5004	4.5135	0	4.6124

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Rice, Milled begins in January for all countries. TY 2021/2022 = January 2022 - December 2022

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

Wheat	2019/2020		2020/2021		2021/2022	
Market Year Begins	Jul 2019		Jul 2020		Jul 2021	
Bangladesh	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	340	340	335	335	0	320
Beginning Stocks (1000 MT)	1258	1258	1858	1858	0	1438
Production (1000 MT)	1200	1200	1220	1180	0	1130
MY Imports (1000 MT)	6800	6800	6600	6000	0	6500
TY Imports (1000 MT)	6800	6800	6600	6000	0	6500
TY Imp. from U.S. (1000 MT)	450	450	0	300	0	0
Total Supply (1000 MT)	9258	9258	9678	9038	0	9068
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Feed and Residual (1000 MT)	300	300	300	300	0	350
FSI Consumption (1000 MT)	7100	7100	7200	7300	0	7400
Total Consumption (1000 MT)	7400	7400	7500	7600	0	7750
Ending Stocks (1000 MT)	1858	1858	2178	1438	0	1318
Total Distribution (1000 MT)	9258	9258	9678	9038	0	9068
Yield (MT/HA)	3.5294	3.5294	3.6418	3.5224	0	3.5313

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Wheat begins in July for all countries. TY 2021/2022 = July 2021 - June 2022

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

Corn Market Year Begins	2019/2020 May 2019		2020/2021 May 2020		2021/2022 May 2021	
Bangladesh	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	510	510	540	550	0	575
Beginning Stocks (1000 MT)	122	122	140	140	0	740
Production (1000 MT)	4100	4100	4600	4700	0	5200
MY Imports (1000 MT)	1368	1368	2400	2300	0	1500
TY Imports (1000 MT)	2003	2003	1900	1700	0	1200
TY Imp. from U.S. (1000 MT)	1	1	0	0	0	0
Total Supply (1000 MT)	5590	5590	7140	7140	0	7440
MY Exports (1000 MT)	150	150	200	100	0	100
TY Exports (1000 MT)	150	150	200	100	0	100
Feed and Residual (1000 MT)	5000	5000	5900	5900	0	6200
FSI Consumption (1000 MT)	300	300	400	400	0	400
Total Consumption (1000 MT)	5300	5300	6300	6300	0	6600
Ending Stocks (1000 MT)	140	140	640	740	0	740
Total Distribution (1000 MT)	5590	5590	7140	7140	0	7440
Yield (MT/HA)	8.0392	8.0392	8.5185	8.5455	0	9.0435

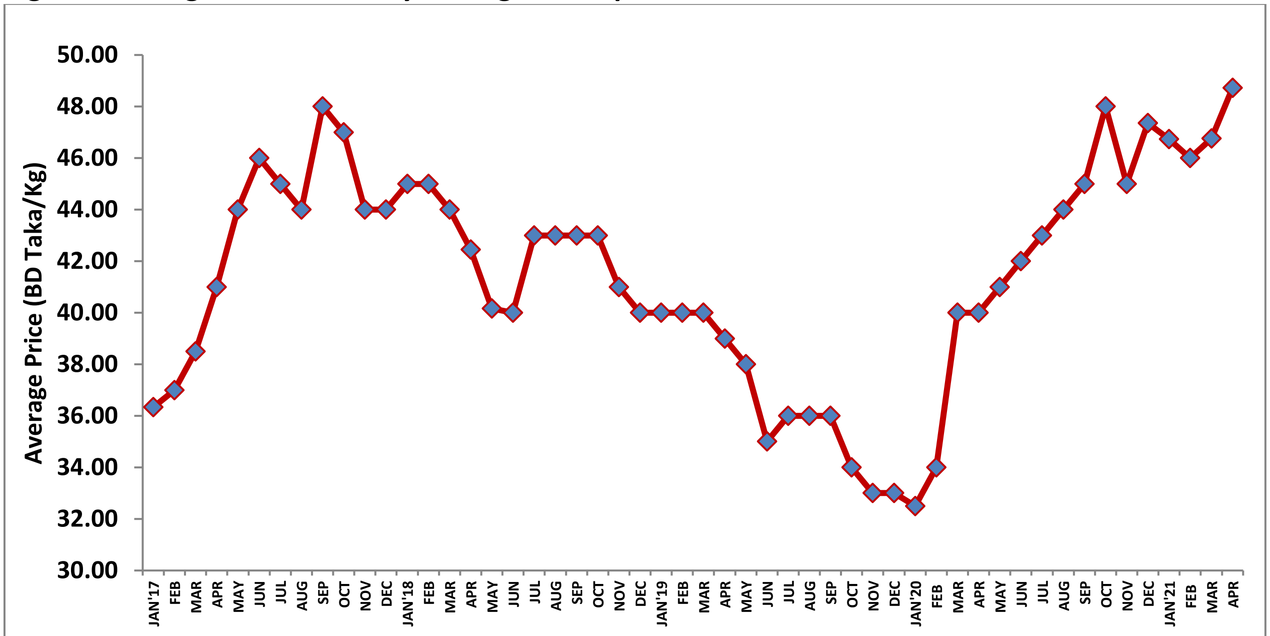
(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Corn begins in October for all countries. TY 2021/2022 = October 2021 - September 2022

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

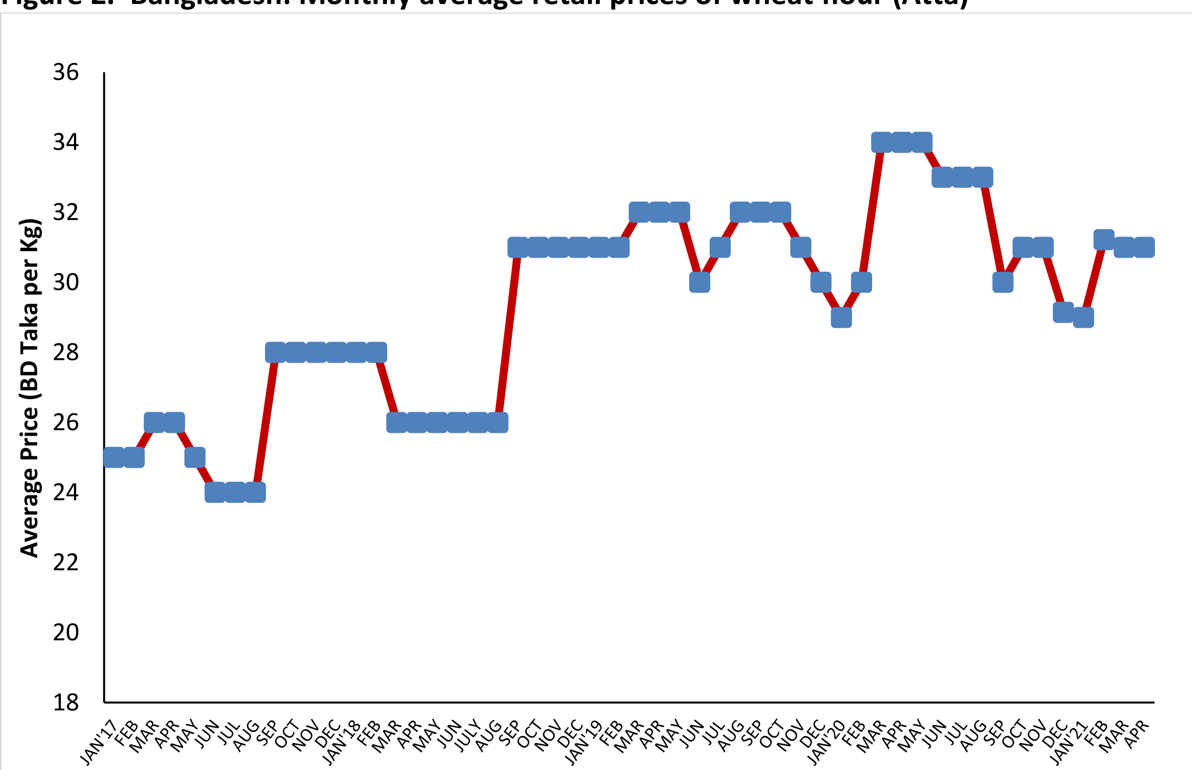
Figure 1. Bangladesh: Monthly average retail prices of coarse rice



Note: US$ 1 = BDT85 (Apr, 2021)

Source: Trading Corporation of Bangladesh

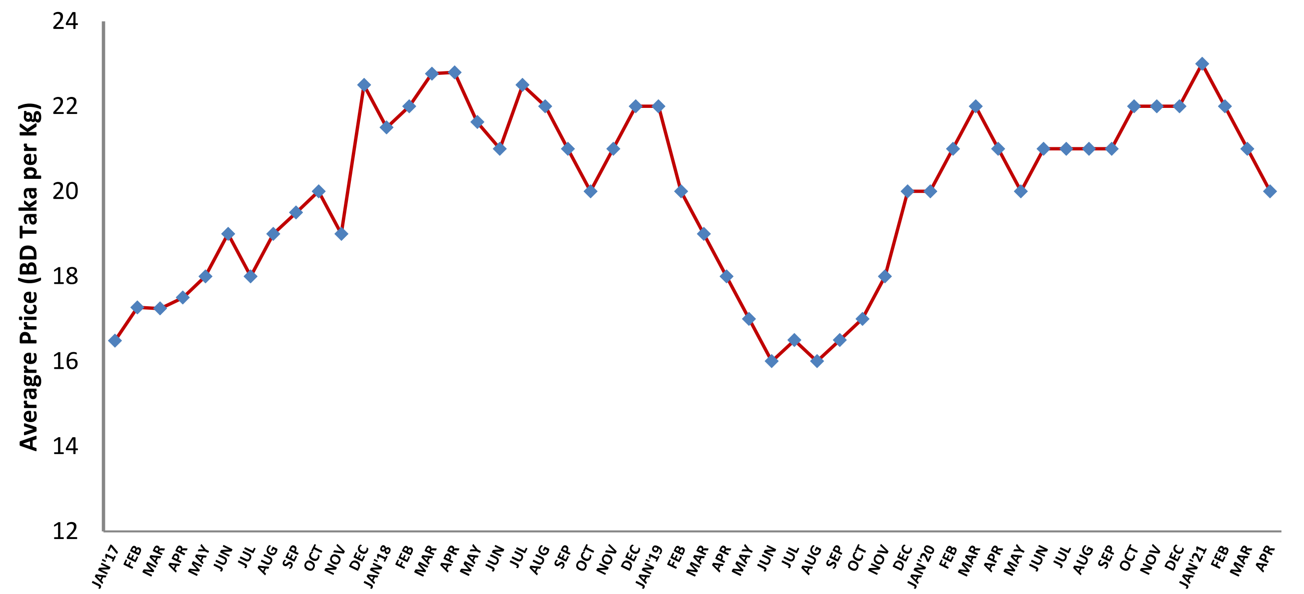
Figure 2. Bangladesh: Monthly average retail prices of wheat flour (Atta)



Note: US$1 = BDT85 (Apr 2021)

Source: Trading Corporation of Bangladesh

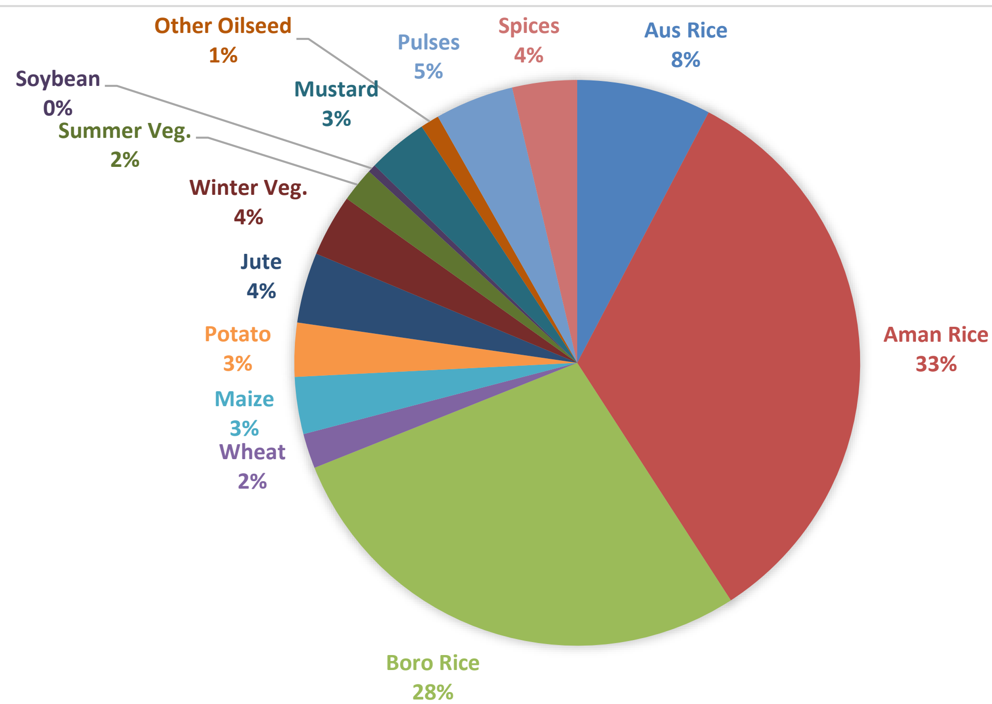
Figure 3. Bangladesh: Monthly average wholesale prices of corn



Note: US$ 1 = BDT 85 (Apr, 2021)

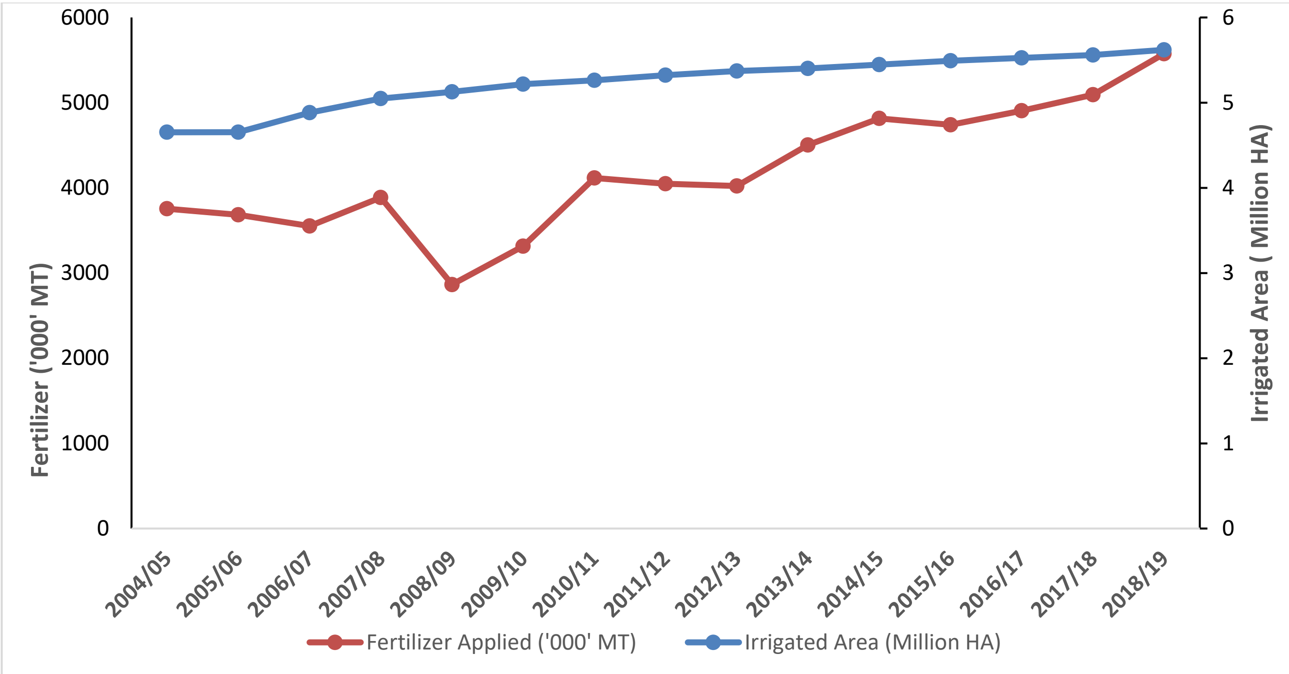
Source: Ministry of Agriculture

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



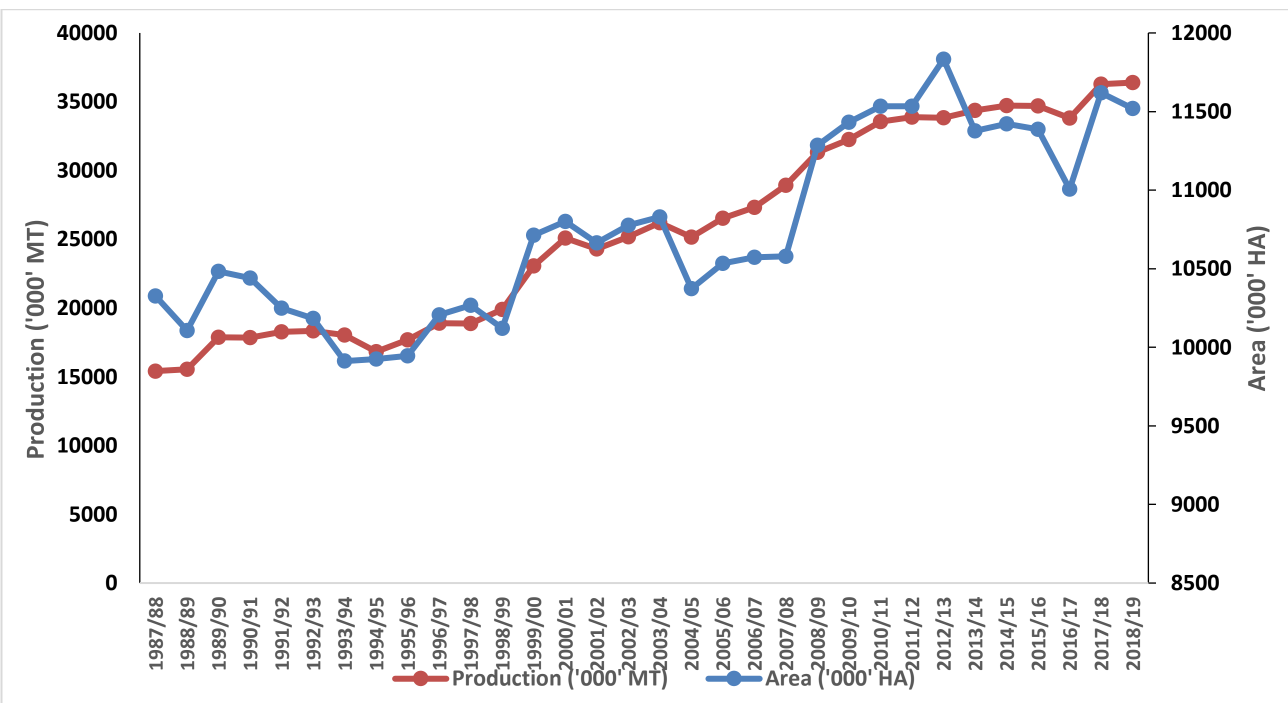
Source: Bangladesh Bureau of Statistics

Figure 5. Bangladesh: Fertilizer application and irrigated area



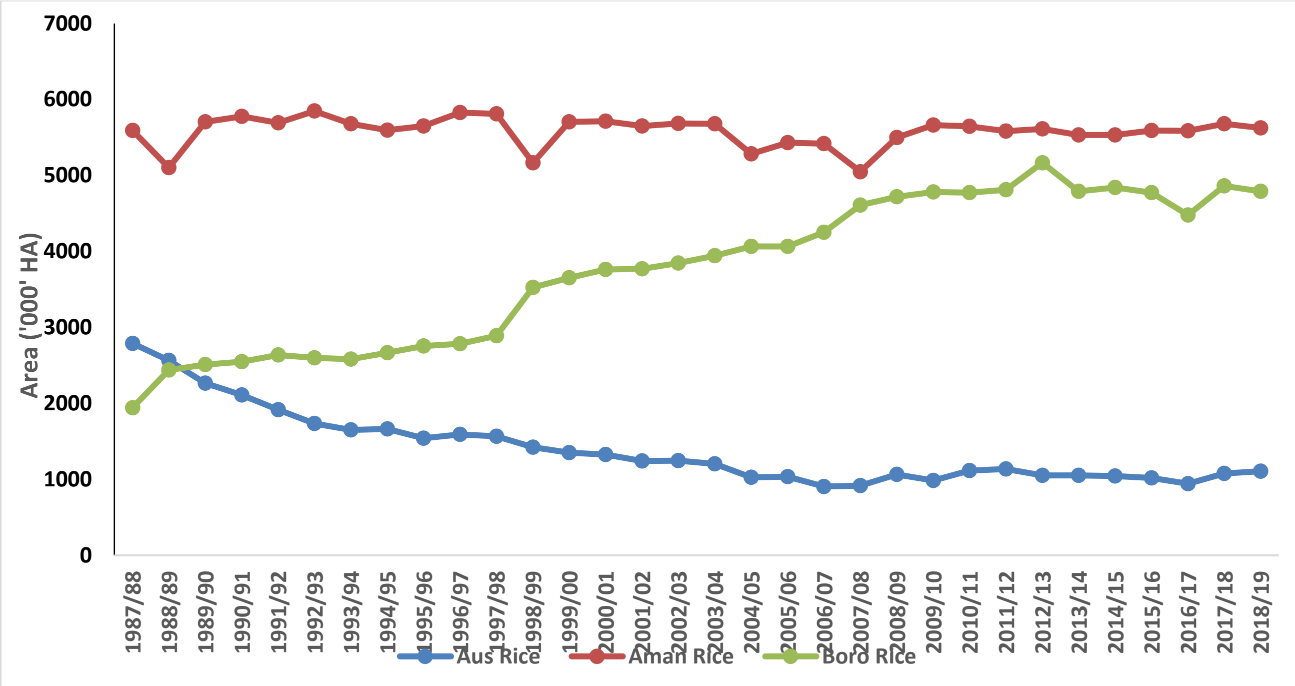
Source: Ministry of Agriculture

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



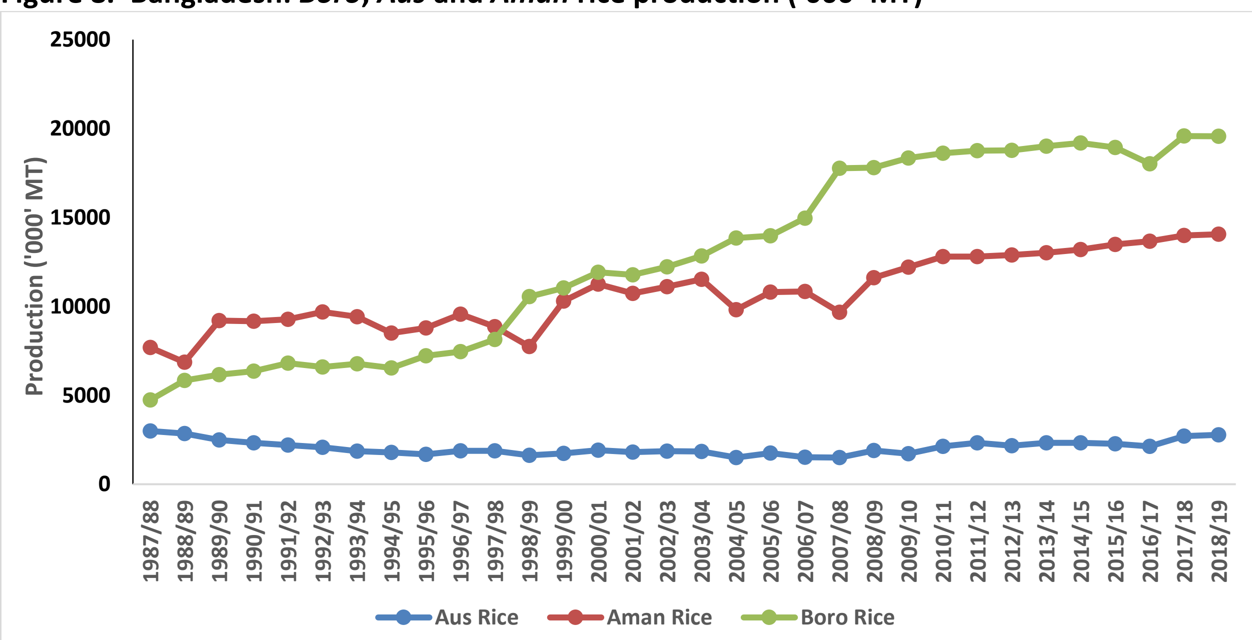
Source: Bangladesh Bureau of Statistics

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



Source: Bangladesh Bureau of Statistics

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



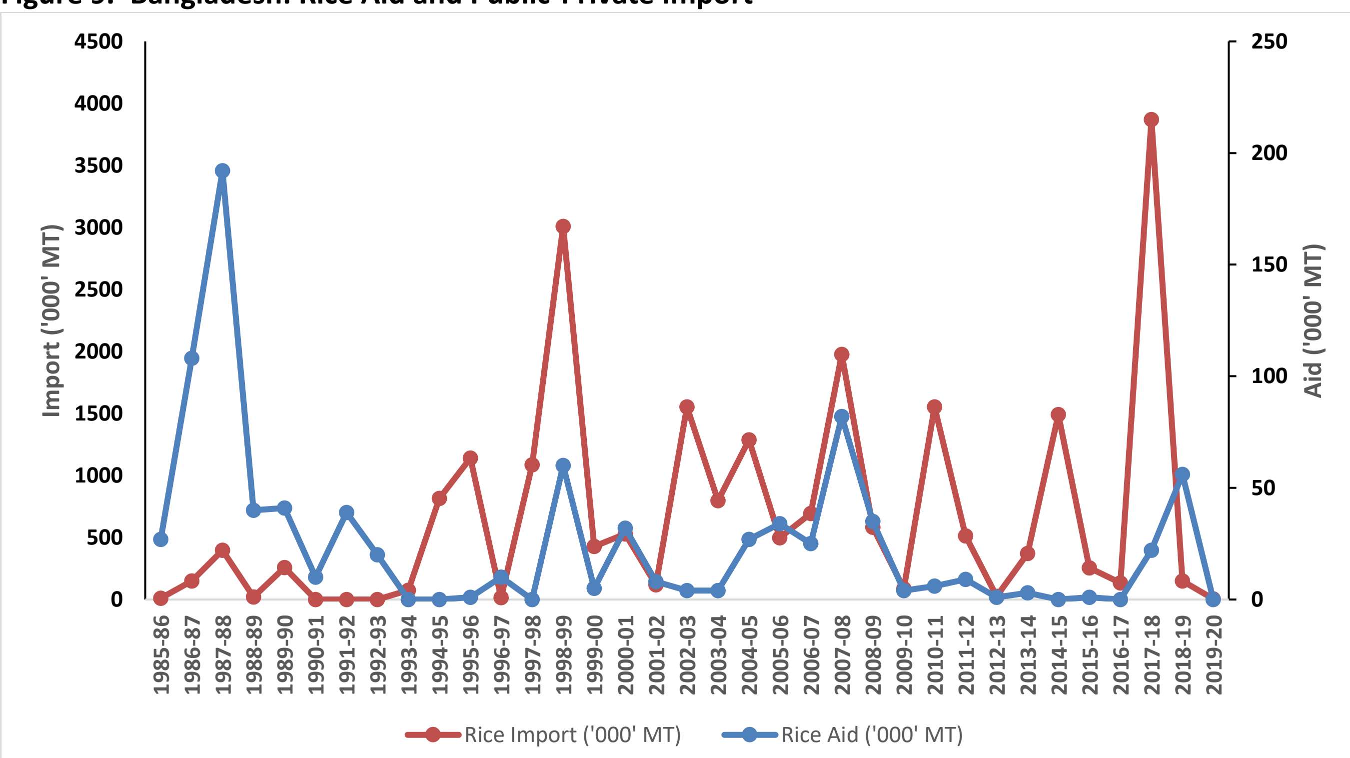
Source: Bangladesh Bureau of Statistics

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

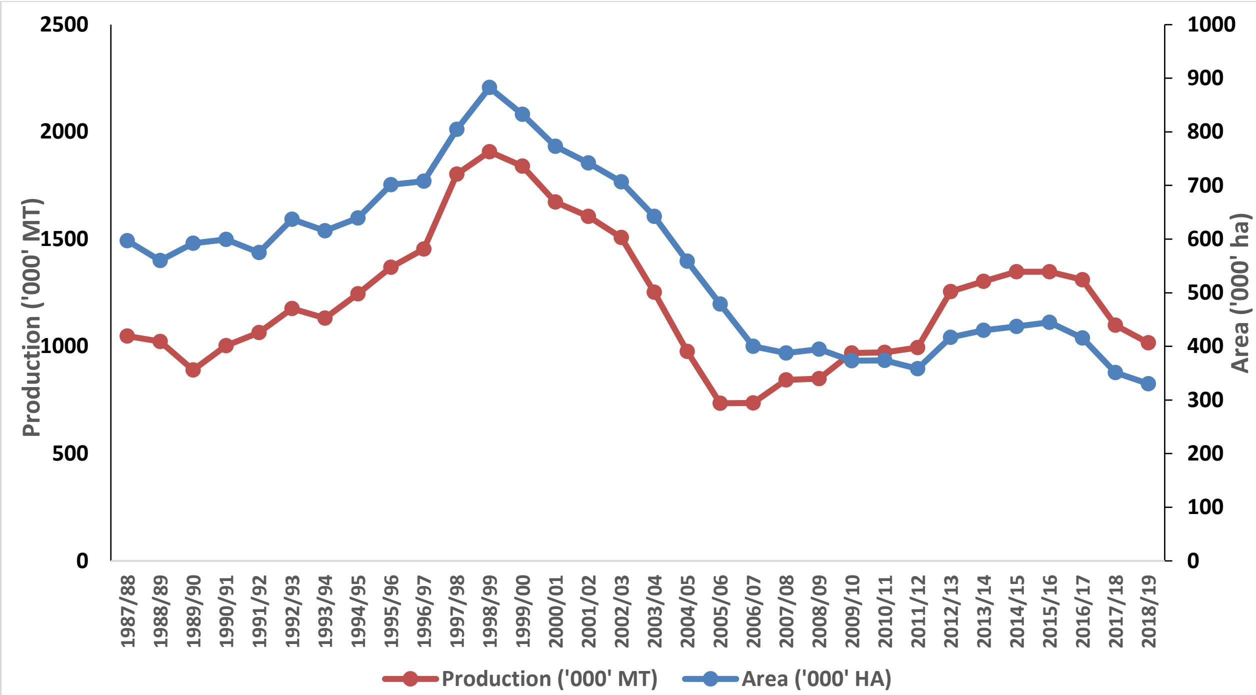
Source: Annual Research Report, 2018-19, Bangladesh Rice Research Institute

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



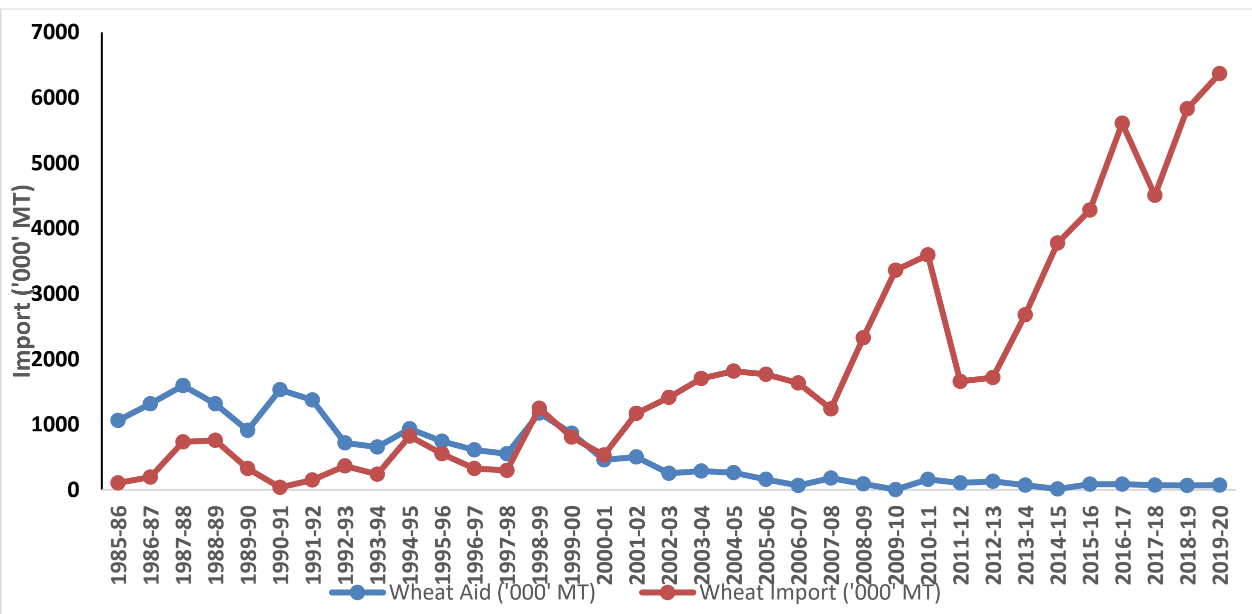
Source: Economic Review, Directorate of Food, Ministry of Food and Disaster Management.
Note: Includes private sector import side by side with public sector since 1992-93.

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

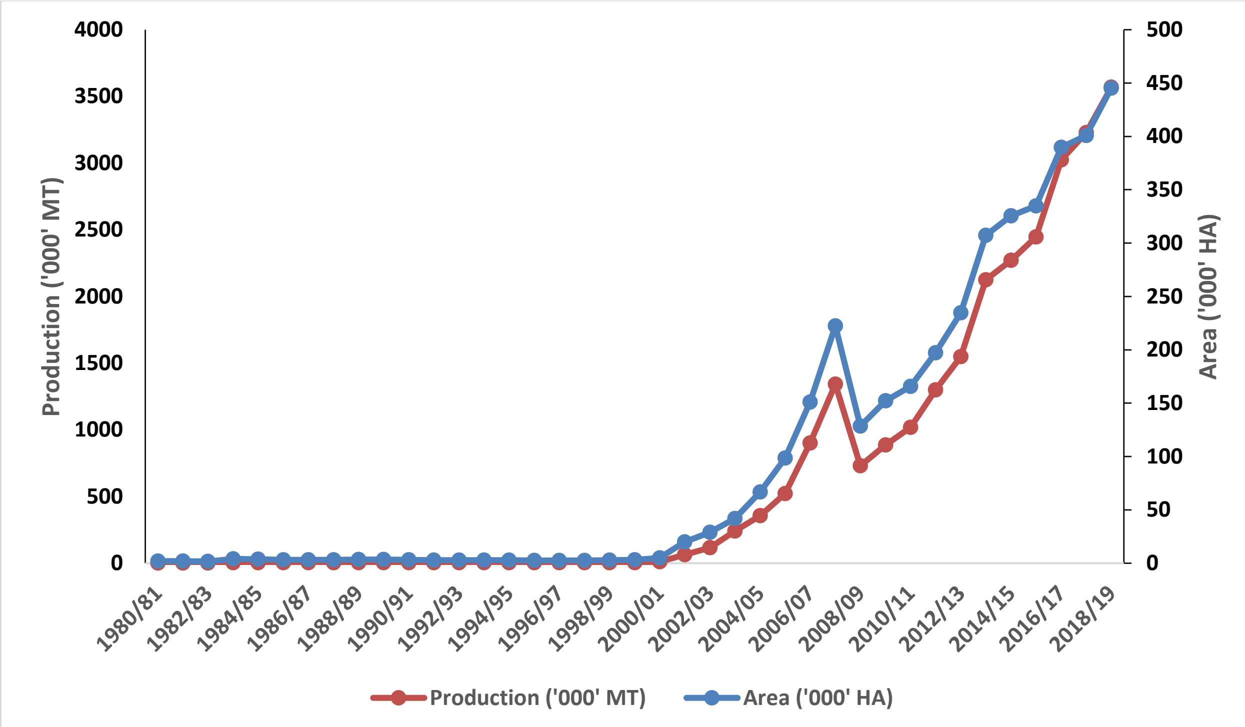


Source: Economic Review, Directorate of Food, Ministry of Food and Disaster Management.

Note: (1). Includes private sector import side by side with public sector since 1992-93.

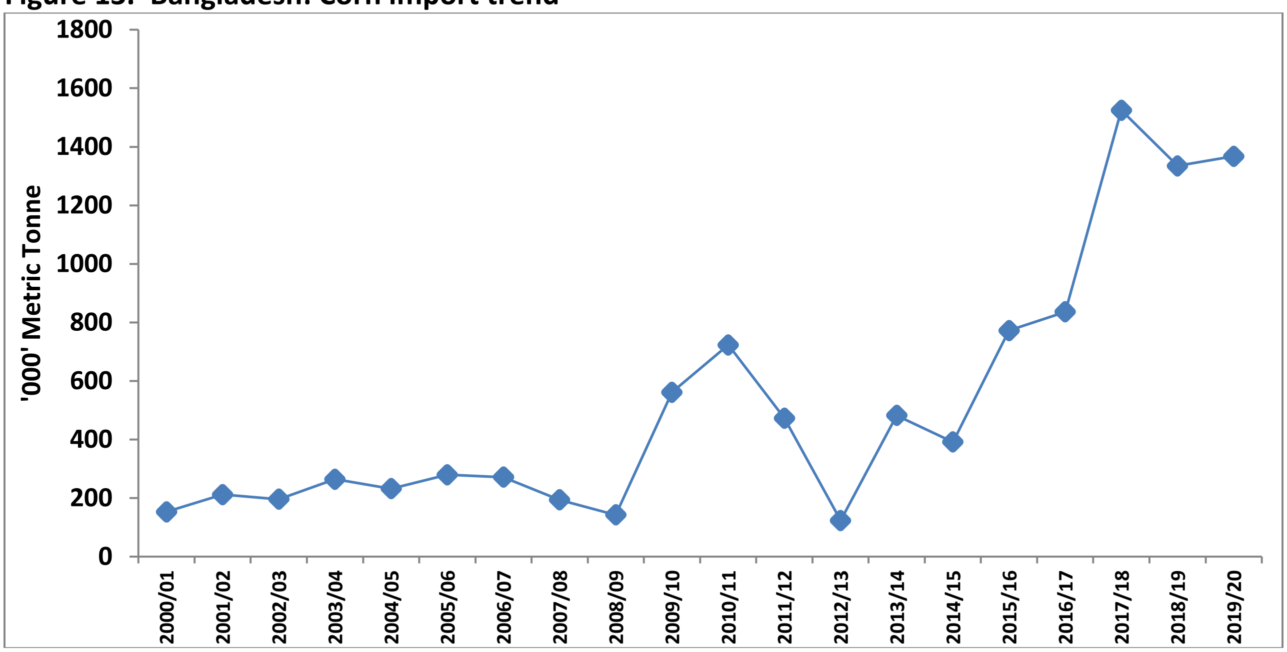
(2). Including food aid wheat receipts for direct distribution by World Vision since 2000-01

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 govt. 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	Tol. Ruminant	Chicken	Duck	Total Poultry
	Million	Million	Million	Million	Million	Million	Million	Million
2010-11	23.121	1.394	3.002	24.149	51.684	234.686	44.12	278.806
2011-12	23.195	1.443	3.082	25.116	52.836	242.866	45.7	288.566
2012-13	23.341	1.45	3.143	25.277	53.211	249.011	47.254	296.264
2013-14	23.488	1.457	3.206	25.439	53.59	255.311	48.861	304.172
2014-15	23.636	1.464	3.27	25.602	53.972	261.77	50.522	312.293
2015-16	23.785	1.471	3.335	25.766	54.357	268.393	52.24	320.633
2016-17	23.935	1.478	3.401	25.931	54.745	275.183	54.016	329.2
2017-18	24.086	1.479	3.468	26.1	55.133	282.145	55.853	337.998
2018-19	24.238	1.486	3.537	26.267	55.528	289.283	57.752	347.035
2019-20	24.391	1.493	3.607	26.435	55.926	296.602	59.716	356.318

Source: Department of Livestock

Table 10. Bangladesh: Contribution of Livestock and Poultry in the National Economy of Bangladesh (2019-20)(Provisional)

Contribution of Livestock in Gross Domestic Product (GDP) (Constant Prices)	1.43%
GDP growth rate of Livestock (Constant Prices)	3.04%
GDP volume (Current prices) (Crore Taka)	43212
Share of Livestock in Agricultural GDP (Current prices)	13.44
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%
Soya	25%
Meat and Bone Meal	5%
Rice Polish (DOB)	3-5%
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	2.45	5.15
2007-08	1.03	1.04	0.5	2.57	4.90
2008-09	1.09	1.1	0.51	2.7	5.06
2009-10	1.03	1.35	0.52	2.9	7.41
2010-11	1.05	1.46	0.55	3.06	5.52
2011-12	0.96	1.73	0.58	3.27	6.86
2012-13	0.96	1.86	0.59	3.41	4.28
2013-14	1	1.96	0.6	3.56	4.40
2014-15	1.02	2.06	0.6	3.68	3.37
2015-16	1.05	2.2	0.63	3.88	5.43
2016-17	1.16	2.33	0.64	4.13	6.44
2017-18	1.21	2.4	0.65	4.26	3.15
2018-19	1.23	2.48	0.66	4.37	2.58

Source: Ministry of Fisheries and Livestock

Table 15. Bangladesh: Protein production

Year	Milk	Meat	Egg
	Million MT	Million MT	Billion Number
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	6.092	4.521	10.17
2014-15	6.97	5.86	11.00
2015-16	7.275	6.152	11.91
2016-17	9.283	7.154	14.93
2017-18	9.406	7.26	15.52
2018-19	9.923	7.514	17.11
2019-20	10.68	7.674	17.36

Source: Ministry of Fisheries and Livestock

Table 16: Bangladesh: Demand, production, availability and deficiency of milk, meat and eggs (FY 2019-20)

Product	Unit/head	Requirement	Availability	Unit	Demand	Production	Deficiency	Surplus
Milk	ml/day	250	175.63	Million MT	15.20	10.68	4.52	
Meat	gm/day	120	126.2	Million MT	7.30	7.67		0.377
Egg	number/year	104	104.23	Billion	17.33	17.36		0.379

*Estimated population of the country: 166.6 million (1st July, 2019)

Source: Department of Fisheries, Ministry of Livestock and Fisheries

Table 17. Bangladesh: Daily per capita food intake

Food Item	2016 Intake (gm)	2010 Intake (gm)	2005 Intake (gm)	2000 Intake (gm)	1995-96 Intake (gm)	2016 Change (%)	2010 Change (%)	2005 Change (%)	2000 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 18. 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	8.15	3.15	1.96	3.54	8.34	6.21
2019-20	5.24	2.08	0.89	3.04	6.36	6.10

Source: Different national statistics publication

Table 19. 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	8.15	14.2	14.84	10.95
2019-20	5.24	5.84	5.47	7.78

Source: Different national statistics publication

Table 20. Bangladesh: Development indicator's progress

FY	Investment (% GDP)			Per Capita Income GPI (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	38.82	5.9
2016-17	7.26	23.01	30.27	1610	15379	38.7	5.4
2017-18	7.97	23.26	31.56	1751	15953	41.27	5.8
2018-19	8.0	23.5	31.6	1909	18079	42.1	5.48
2019-20	8.1	23.6	31.8	2064	19630	45.4	5.65

Source: Different national statistics publication

Table 21. 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 22. Bangladesh: CPI and Food, Non-Food inflation (All Rural)

Fiscal Year	Consumer Price Index			Inflation (point to point)		
	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
2018-19	258.65	281.33	229.58	5.48	5.51	5.43
2019-20	273.26	296.96	243.00	5.65	5.56	5.85

Source: Economic Review, Ministry of Finance

Attachments:

No Attachments