

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## India

**Post:** New Delhi

### Grain and Feed Update – September 2015

**Report Categories:**

Grain and Feed

Agricultural Situation

Agriculture in the Economy

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**Report Highlights:**

On August 17, 2015, the Ministry of Agriculture (MoA) revised the Indian crop year (ICY) 2014/15 (July-June) grain production estimate to 252.7 million metric tons (MMT). This revision is marginally higher over the previous estimate (May 2015), but nearly five percent lower than the last year's record production. The grain PSDs in this report are revised to reflect the latest official estimates.

# General Information:

## Government Raises 2014/15 Grain Harvest Marginally

On August 17, 2015, the MoA released [the Fourth Advance Estimates of Production of Food Grain for Indian Crop Year \(ICY\) 2014/15](#) (July-June) and raised Indian grain production to 252.7 MMT. This marks a marginal increase over the [third advance estimate](#) of 251.1 MMT from May 2015. The production estimates for rice and corn are raised, but lowered for wheat and pulses. Nevertheless, the latest ICY 2014/15 production estimate is nearly five percent lower than the last year's record 265 MMT, due largely to the delayed 2014 monsoon and untimely rains during harvest of *rabi* (winter planted) crops (February-April 2015).

ICY 2014/15 grain production includes rice, coarse grains, and pulses harvested last fall and this spring (MY 2014/15), and wheat and barley crops harvested in March-May, 2015 (MY 2015/16). Typically, the fourth advance estimates are subject to minor revisions when they are finalized in February 2016. Consequently, the PSDs for grains have been adjusted to reflect the official production estimates.

## 2015 Monsoon Rains Scattered in August...

As of the last week of July, India's 2015 monsoon has been patchy in most parts of the country(see Appendix 1 and 2) with prolonged periodic dry spells and uneven regional distribution. August's average precipitation was 22 percent below the long-term average (deficient), particularly in the Gangetic plains, and throughout most of peninsular India. Sources report that the rainfall deficiency levels during August in some areas was the highest since 1993. According to the Indian Meteorological Department (IMD), India's cumulative precipitation from June through August 26 was 12-percent below the seasonal long-term average (see Appendix 1). Rainfall was reported normal in 21 weather subdivisions, and rainfall was deficient in the remaining 15 sub-divisions, to include agriculturally important states of Punjab, Haryana, Uttar Pradesh, Bihar, Maharashtra, Telangana and parts of Gujarat and Madhya Pradesh.

## ... *Kharif* Planting Stagger

After a strong start in June, the planting of *kharif* (fall harvested) crops slowed in August. The MY 2015/16 *kharif* season grains include rice, coarse grains (corn, sorghum, millet), and pulses (pigeon pea, mung bean, black matpe).

**Table 1: India: Planting of *Kharif* Crops in Indian Crop Year (July/June)**

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(Area in Million Hectares)

Crop	ICY 2015/16 Progressive Planting till 28-Aug-15	ICY 2014/15 Progressive Planting till 28-Aug-14	ICY 2015/16 Progressive Planting till 31-Jul-15	ICY 2014/15 Progressive Planting till 31-Jul-14	ICY 2015/16 Progressive Planting till 3-Jul-15	ICY 2014/15 Progressive Planting till 3-Jul-14
Rice	34.59	34.55	22.78	21.48	5.4	5.36
Pulses	10.55	9.42	8.24	6.82	2.26	0.97
Coarse cereals	17.25	16.72	14.85	12.55	4.37	2.89
Oilseeds	17.46	17.23	14.85	13.56	7.42	1.47
Sugarcane	4.88	4.72	4.73	4.64	4.37	4.39
Cotton	11.27	12.25	10.19	10.48	6.02	3.54
Total	96.78	95.69	76.43	70.34	30.61	19.43

Source: Ministry of Agriculture, Government of India (GOI).

Adequate monsoonal rains during the critical planting period (June through mid-July) supported higher planting of coarse grains and pulses. However, relatively deficient rain since the last week of July slowed planting of *kharif* rice. However, *kharif* rice enjoys a relatively long planting window and can continue through the first week of September. The planting season for other *kharif* food grains concluded by the third week of August. Due to deficient rains in August, the standing *kharif* crops are likely facing moisture stress, particularly in unirrigated areas (55 percent of net cultivated areas), although to date there are no official reports of crop damage. September rains will be critical for crop growth and attaining the forecast productivity for the upcoming MY 2015/16.

## RICE

**Table 2. India: Commodity, Rice Milled PSD**

Area in thousand hectares, quantity in thousand metric tons and yield in MT/hectare

<i>Rice, Milled</i>	2013/2014		2014/2015		2015/2016	
<i>Market Begin Year</i>	Oct 2013		Oct 2014		Oct 2015	
<i>India</i>	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	43,940	43,940	43,000	43,000	44,000	44,000
Beginning Stocks	25,440	25,440	22,651	22,651	15,300	15,600
Milled Production	106,540	106,540	102,500	104,800	104,000	104,000
Rough Production	159,826	159,826	153,765	157,216	156,016	156,016
Milling Rate (.9999)	6,666	6,666	6,666	6,666	6,666	6,666
MY Imports	0	0	0	0	0	0
TY Imports	0	0	0	0	0	0
TY Imp. from U.S.	0	0	0	0	0	0
Total Supply	131,980	131,980	125,151	127,451	119,300	119,600

MY Exports	10,149	10,149	10,600	11,700	8,500	9,000
TY Exports	10,907	10,907	11,000	11,500	9,000	9,000
Consumption and Residual	99,180	99,180	99,251	100,151	99,200	99,000
Ending Stocks	22,651	22,651	15,300	15,600	11,600	11,600
Total Distribution	131,980	131,980	125,151	127,451	119,300	119,600
Yield (Rough)	3.6374	3.6374	3.5759	3.6562	3.5458	3.5458

### MY 2015/16 Prospects Unchanged

Despite relatively deficient rains in August, Post continues to estimate MY 2015/16 rice production unchanged at 104 MMT based on timely and near-normal planting. Despite the slowdown in rice planting in August, the MoA estimates rice area planted through August 27, 2015, at 34.6 million hectares, marginally higher than last year and consistent with the last five-year average for the corresponding period.

**Table 3. India: Planting of Kharif Rice by State as of August 27**  
(Area in Million Hectares)

State	Normal <sup>1</sup> Total Kharif Planting	Normal <sup>1</sup> Area for Week Ending August 27	MY 2015/16	MY 2014/15	MY 2013/14
Andhra Pradesh	1.56	1.10	0.99	0.96	1.16
Assam	2.12	2.04	2.03	1.86	1.94
Bihar	3.07	3.05	3.21	3.18	2.74
Chattisgarh	3.75	3.56	3.64	3.59	3.59
Haryana	1.23	1.15	1.24	1.14	1.15
Jharkhand	1.17	1.14	1.61	1.38	1.01
Karnataka	1.09	0.75	0.55	0.64	0.88
Madhya Pradesh	1.71	1.71	1.92	2.12	1.82
Maharashtra	1.51	1.36	1.14	0.98	1.48
Odisha	3.89	3.31	3.17	3.39	3.38
Punjab	2.83	2.79	2.84	2.82	2.77
Tamil Nadu	1.62	0.25	0.28	0.25	0.20
Telangana	1.04	0.65	0.41	0.52	0.76
Uttar Pradesh	5.71	5.82	5.90	5.70	5.91
West Bengal	4.09	3.76	3.45	3.86	3.96
Others	2.47	2.09	2.22	2.17	2.24
Total	38.83	34.50	34.59	34.55	34.98

Note <sup>1</sup> Average planting for the period MY 2010/11 to 2014/15.

Source: Ministry of Agriculture, Government of India (GOI).

The planting for rice has concluded in most states, except for some pockets in the eastern region, and

coastal Andhra Pradesh and Tamil Nadu. While rice faces moisture stress in most growing areas, to date, there have not been any official reports of crop damage in the unirrigated areas. The rice crop is performing well in the irrigated areas. However, rains in unirrigated areas during the first two weeks of September are critical for rice to attain the forecast production.

Assuming normal rainfall levels during September, Post continues to forecast MY 2015/16 production at 104 MMT from 44 million hectares. However, deficient rains and/or a prolonged dry spell in September/early October, as well as a cyclonic build-up in September and October could lower the current forecast.

### **MY 2014/15 Production Raised**

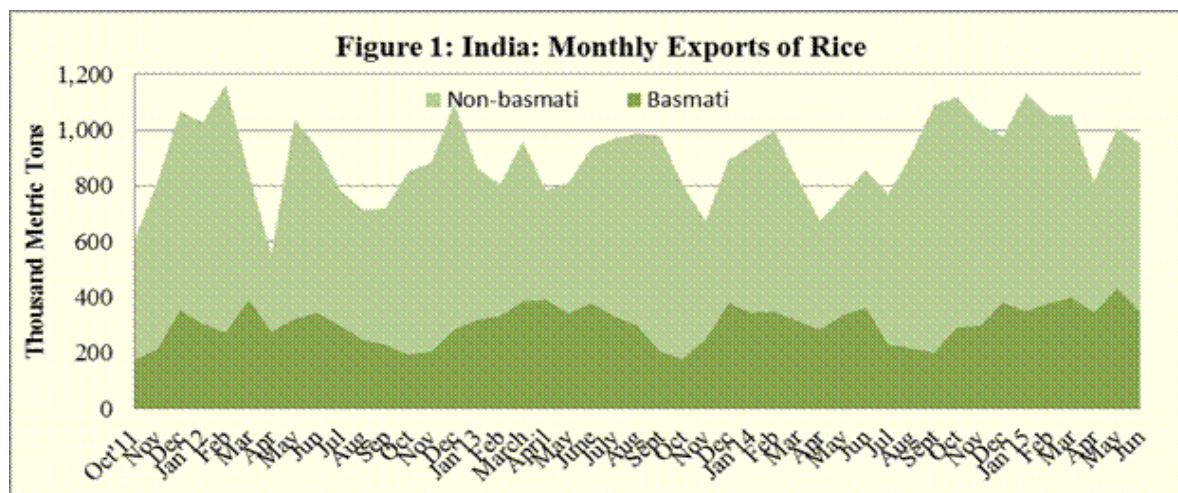
Based on the latest official data, MY 2014/16 rice production is raised higher to 104.8 MMT, largely due to higher than anticipated yields in the central and eastern states.

### **Consumption Revised**

Consumption estimate in the PSD have been adjusted to reflect the changes in the production and export estimates.

### **Record MY 2014/15 Exports**

Post continues to estimate MY 2015/16 rice exports at a record 11.7 MMT based on continued strong exports in the second half of the marketing year on stable domestic prices coupled with continued strong export demand (see [IN5098](#)).



According to the available preliminary official figures, MY 2014/15 rice exports through June 2015 are estimated at 9.14 MMT, about 1.7 MMT higher compared to last year's exports during the corresponding period. Expected steady export demand and domestic prices during the last quarter is likely to raise MY 2014/15 exports to a record 11.7 MMT. Assuming no major changes in the international market and Indian export policy, MY 2015/16 rice export is forecast at 9.0 MMT, lower than previous year record exports due to forecast tight domestic supplies. However, exports could

decline from the forecast level if the production is adversely affected by deficient rains in September and other weather abnormalities, and/or the Government of India (GOI) imposes export control measures on price concerns in the domestic market.

## WHEAT

**Table 4. India: Commodity, Wheat PSD**

Area in thousand hectares, quantity in thousand metric tons and yield in MT/hectare

<i>Wheat</i>	2013/2014		2014/2015		2015/2016	
<i>Market Begin Year</i>	Apr 2013		Apr 2014		Apr 2015	
<i>India</i>	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	30,000	30,000	31,530	31,530	30,600	30,600
Beginning Stocks	24,200	24,200	17,830	17,830	17,200	17,200
Production	93,510	93,510	95,850	95,850	90,000	88,940
MY Imports	25	25	52	52	800	800
TY Imports	22	22	262	262	800	800
TY Imp. from U.S.	0	0	0	0	0	0
Total Supply	117,735	117,735	113,732	113,732	108,000	106,940
MY Exports	6,053	6,053	3,402	3,402	300	300
TY Exports	5,354	5,354	1,700	1,700	300	300
Feed and Residual	4,800	4,800	4,500	4,500	4,800	4,800
FSI Consumption	89,052	89,052	88,630	88,630	91,000	89,940
Total Consumption	93,852	93,852	93,130	93,130	95,800	94,740
Ending Stocks	17,830	17,830	17,200	17,200	11,900	11,900
Total Distribution	117,735	117,735	113,732	113,732	108,000	106,940
Yield	3.1170	3.1170	3.0400	3.0400	2.9412	2.9065

### Production Revised

Based on the latest official production revision, Post's MY 2015/16 wheat production estimate is revised to 88.9 MMT, about seven percent lower than the MY 2014/15 record production of 95.9 MMT. India's MY 2015/16 wheat harvest was adversely affected by unfavorable weather (untimely rains, hail, and strong winds) during harvest (late February through mid-April) resulting in significant crop damage due to lodging and other harvest losses. The MoA has steadily revised the MY 2015/16 wheat production estimate lower from its initial (February 2015) estimate of 95.8 MMT based on the information from state governments.

MY 2015/16 consumption has been marginally revised to 89.9 MMT to account for the revision in the production estimate. Other PSD estimates remain unchanged from the last update ([IN5103](#)).

## COARSE GRAINS

Post's MY 2014/15 corn, millet and sorghum and MY 2015/16 barley production estimates are revised to reflect the latest MoA official estimates. Consumption and ending stocks in the PSD's have been adjusted to reflect the changes in the production estimates. Post continues to estimate MY 2015/16 coarse grain production unchanged from previous updates.

While revisions in the production estimates for millet, sorghum and barley have been minor, corn production estimate has been revised significantly higher to 23.7 MMT from the MoA's third advance estimate of 22.7 MMT raising the production estimates for both *kharif* and *rabi* corn. However, most market sources continue to estimate the MY 2014/15 corn production in the range of 20 to 21 MMT based on the market supply and price situation.

**Table 5. India: Commodity, Corn PSD**

Area in thousand hectares, quantity in thousand metric tons and yield in MT/hectare

<b>Corn</b>	2013/2014		2014/2015		2015/2016	
<b>Market Begin Year</b>	Nov 2013		Nov 2014		Nov 2015	
<b>India</b>	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	9,430	9,430	9,300	9,300	9,200	9,200
Beginning Stocks	651	651	1,447	1,447	1,257	2,127
Production	24,260	24,260	22,500	23,670	23,500	23,500
MY Imports	7	7	10	10	50	50
TY Imports	11	11	10	10	50	50
TY Imp. from U.S.	0	0	0	0	0	0
Total Supply	24,918	24,918	23,957	25,127	24,807	25,677
MY Exports	3,871	3,871	1,000	1,000	2,000	2,000
TY Exports	3,889	3,889	1,000	1,000	2,000	2,000
Feed and Residual	10,600	10,600	12,500	12,500	12,300	12,800
FSI Consumption	9,000	9,000	9,200	9,500	9,400	9,500
Total Consumption	19,600	19,600	21,700	22,000	21,700	22,300
Ending Stocks	1,447	1,447	1,257	2,127	1,107	1,377
Total Distribution	24,918	24,918	23,957	25,127	24,807	25,677
Yield	2.5726	2.5726	2.4194	2.5452	2.5543	2.5543

**Table 6. India: Commodity, Millet PSD**

Area in thousand hectares, quantity in thousand metric tons and yield in MT/hectare

<i>Millet</i>	2013/2014		2014/2015		2015/2016	
<i>Market Begin Year</i>	Nov 2013		Nov 2014		Nov 2015	
<i>India</i>	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	9,750	9,750	8,640	8,640	9,000	9,000
Beginning Stocks	450	450	510	510	380	430
Production	11,660	11,660	11,270	11,420	11,000	11,000
MY Imports	0	0	0	0	0	0
TY Imports	0	0	0	0	0	0
TY Imp. from U.S.	0	0	0	0	0	0
Total Supply	12,110	12,110	11,780	11,930	11,380	11,430
MY Exports	0	0	0	0	0	0
TY Exports	0	0	0	0	0	0
Feed and Residual	1,600	1,600	1,400	1,500	1,400	1,400
FSI Consumption	10,000	10,000	10,000	10,000	9,500	9,500
Total Consumption	11,600	11,600	11,400	11,500	10,900	10,900
Ending Stocks	510	510	380	430	480	530
Total Distribution	12,110	12,110	11,780	11,930	11,380	11,430

**Table 7. India: Commodity, Sorghum PSD**

Area in thousand hectares, quantity in thousand metric tons and yield in MT/hectare

<i>Sorghum</i>	2013/2014		2014/2015		2015/2016	
<i>Market Begin Year</i>	Nov 2013		Nov 2014		Nov 2015	
<i>India</i>	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	5,900	5,900	5,500	5,500	6,000	6,000
Beginning Stocks	145	145	398	398	238	298
Production	5,540	5,540	4,790	5,050	5,500	5,500
MY Imports	0	0	0	0	0	0
TY Imports	0	0	0	0	0	0
TY Imp. from U.S.	0	0	0	0	0	0



Total Supply	5,685	5,685	5,188	5,448	5,738	5,798
MY Exports	87	87	50	50	100	100
TY Exports	89	89	50	50	100	100
Feed and Residual	700	700	700	700	750	750
FSI Consumption	4,500	4,500	4,200	4,400	4,500	4,600
Total Consumption	5,200	5,200	4,900	5,100	5,250	5,350
Ending Stocks	398	398	238	298	388	348
Total Distribution	5,685	5,685	5,188	5,448	5,738	5,798
Yield	0.9390	0.9390	0.8709	0.9182	0.9167	0.9167

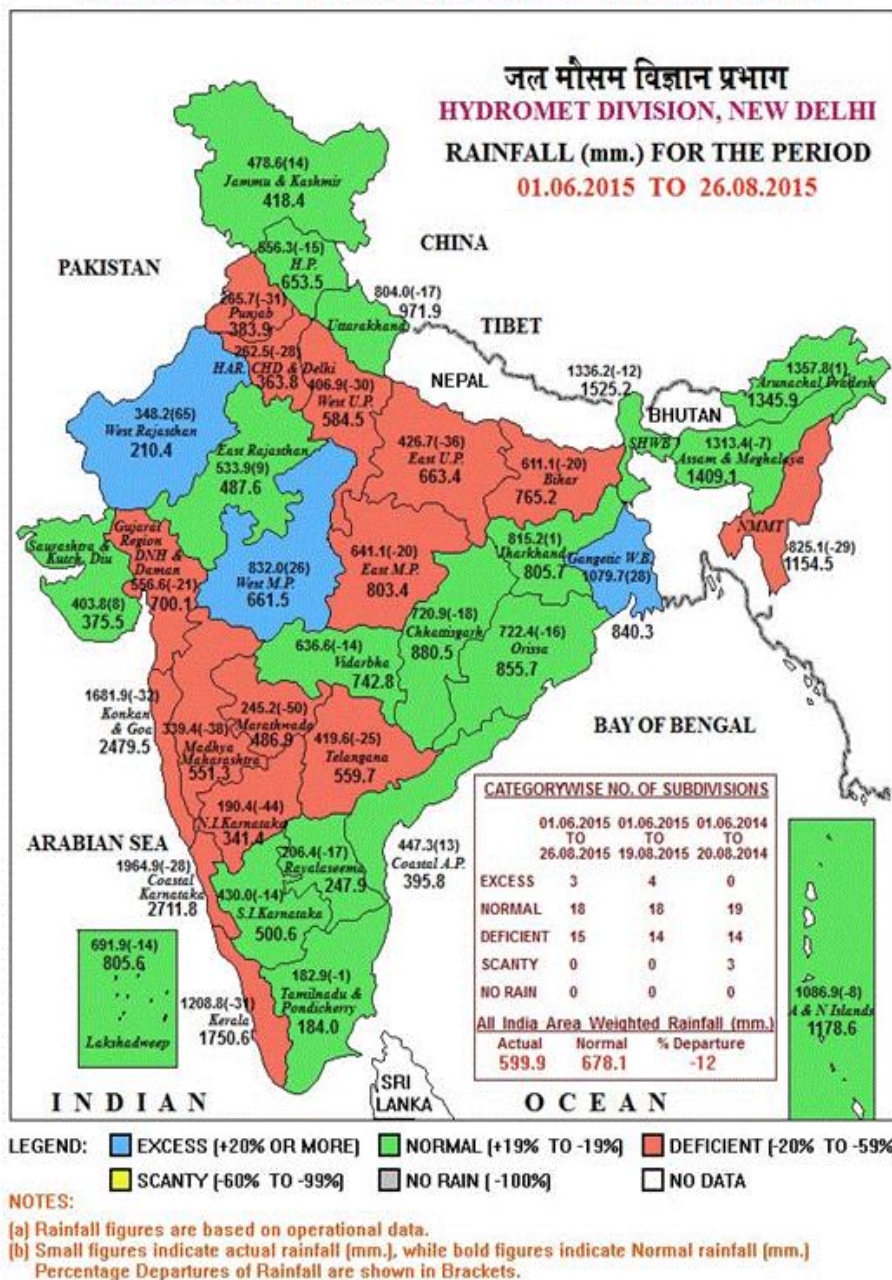
**Table 8. India: Commodity, Barley PSD**

Area in thousand hectares, quantity in thousand metric tons and yield in MT/hectare

<b>Barley</b>	2013/2014		2014/2015		2015/2016	
<b>Market Begin Year</b>	Apr 2013		Apr 2014		Apr 2015	
<b>India</b>	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	780	780	810	810	800	800
Beginning Stocks	120	120	231	231	212	212
Production	1,750	1,750	1,830	1,830	1,630	1,600
MY Imports	2	2	1	1	5	5
TY Imports	1	1	5	5	5	5
TY Imp. from U.S.	0	0	0	0	0	0
Total Supply	1,872	1,872	2,062	2,062	1,847	1,817
MY Exports	441	441	450	450	400	400
TY Exports	546	546	300	300	400	400
Feed and Residual	200	200	200	200	200	200
FSI Consumption	1,000	1,000	1,200	1,200	1,100	1,100
Total Consumption	1,200	1,200	1,400	1,400	1,300	1,300
Ending Stocks	231	231	212	212	147	117
Total Distribution	1,872	1,872	2,062	2,062	1,847	1,817
Yield	2.2436	2.2436	2.2593	2.2593	2.0375	2.0000

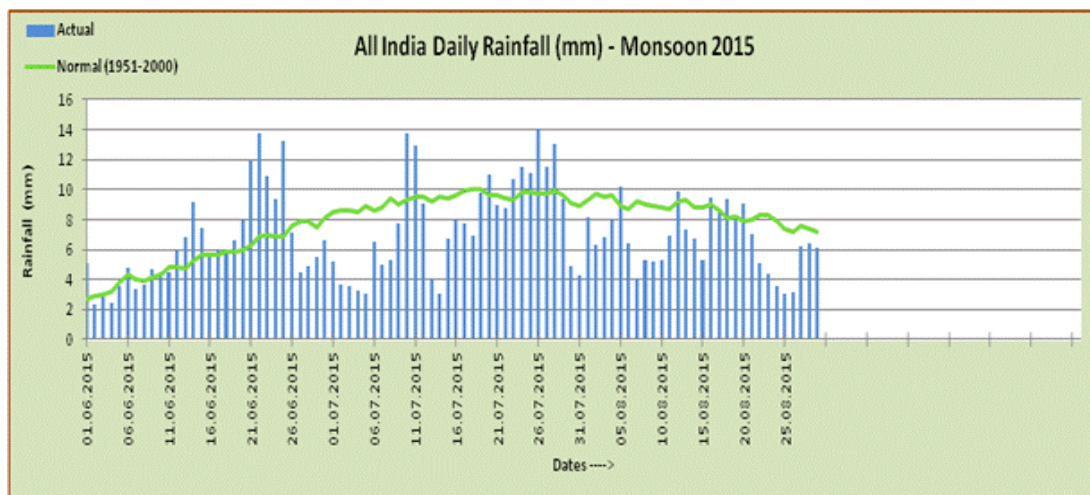
**Appendix 1. India: Cumulative South West Rainfall Till [August 26, 2015](#).**

# भारत मौसम विज्ञान विभाग INDIA METEOROLOGICAL DEPARTMENT



Source: [Indian Metrological Department, GOI.](http://indianmetrologicaldepartment.gov.in)

Appendix 2. India: Daily Mean Rainfall over normal rainfall till August 29, 2015.



Source: [Indian Metrological Department, GOI](#)