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Grain Voluntary Update-February 2013

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Report Highlights:

The Ministry of Agriculture released the *Second Advance Estimate for the Indian Crop Year 2012/13 (June/May)* on February 8th, forecasting food grain production at a near-record 250.1 million tons, despite a “below normal” 2012 monsoon. The ministry also raised the Indian crop year 2011/12 final food grain production estimate to a new record 259.3 million tons, largely on record production of rice, wheat and corn.

General Information:

Ministry of Agriculture Forecasts Bumper Food Grain Production

On February 8, 2013, the Ministry of Agriculture released the [*Second Advance Estimate for the Indian Crop Year \(ICY\) 2012/13 \(June/May\)*](#). The report forecasts ICY 2012/13 food grain production at 250.14 million tons, the second-highest food grain production in Indian history, despite a ‘below normal and erratic’ 2012 monsoon. However, the second advance estimates are subject to revision and the final estimates for the ICY 2012/13 are likely to be released by February 2014.

The ICY 2012/13 food grain production forecasts include rice, corn, sorghum, and millet crops harvested in Oct/Dec 2012 (MY 2012/13) and to be harvested in March/May 2013 (MY 2012/13); wheat and barley crops to be harvested in March/April 2012 (MY 2013/14); and pulse crops harvested in Oct/Dec 2012 and to be harvested in March/April 2013 (MY 2013/14).

The Ministry also issued the final food grain production estimate of ICY 2011/12 at a new record 259.32 million tons, nearly 1.5 million tons higher than the Fourth Advance Estimate released in July 2012. The grain production increase has been largely accounted for by rice, wheat and corn, on higher than previously anticipated yields. Post agrees with the government estimates as they are based on the crop cutting experiments on *kharif* (fall and early harvested) and the *rabi* (spring harvested) food grain crops.

Production Estimate Raised

Based on the latest government release, the MY 2012/13 rice and corn production forecasts have been raised to 100.0 million tons and 20.5 million tons, respectively. Based on the final official estimate for the ICY 2011/12, MY 2011/12 rice production has been raised to 105.31 million tons, MY 2011/12 corn production raised to 21.76 million tons, and MY 2012/13 wheat production has been raised to 94.88 million tons.

Government reports suggest that recovery of the 2012 monsoon rains supported higher productivity of *kharif* rice and corn. However, planting of *rabi* rice is currently lagging behind last year’s level, and drought like conditions in Maharashtra and Karnataka will likely affect the *rabi* corn crop. Consequently, Post expects MY 2012/13 rice and corn crops to be lower than the government’s second advance estimate of 101.8 million tons rice and 21.06 million tons corn.

Based on the latest official data, MY2011/12 corn exports have been revised marginally lower to 4.55 million tons. Consumption and stock estimates in the PSD (see below) have been revised to reflect the revised production and trade estimates.

STATISTICAL TABLES

RICE

Table 1. India: Commodity, Rice, Milled, PSD

(Area in Thousand Hectares, Others in Thousand Metric Tons)

Rice, Milled India	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Oct 2010		Market Year Begin: Oct 2011		Market Year Begin: Oct 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	42,860	42,860	44,100	44,100	43,000	43,000
Beginning Stocks	20,500	20,500	23,500	23,500	25,100	25,100
Milled Production	95,980	95,980	104,320	105,310	99,000	100,000
Rough Production	143,984	143,984	156,496	157,981	148,515	150,015
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	116,480	116,480	127,820	128,810	124,100	125,100
MY Exports	2,774	2,774	10,376	10,376	8,000	8,000
TY Exports	4,637	4,637	10,250	10,250	7,500	7,500
Consumption and Residual	90,206	90,206	92,344	93,334	94,600	95,600
Ending Stocks	23,500	23,500	25,100	25,100	21,500	21,500
Total Distribution	116,480	116,480	127,820	128,810	124,100	125,100
Yield (Rough)	3.	3.3594	4.	3.5823	3.	3.4887
TS=TD		0		0		0

Table 2. India: Commodity, Wheat, PSD

(Area in Thousand Hectares, Others in Thousand Metric Tons)

Wheat India	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Apr 2010		Market Year Begin: Apr 2011		Market Year Begin: Apr 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	28,460	28,460	29,400	29,400	29,690	29,690
Beginning Stocks	16,120	16,120	15,360	15,360	19,950	19,950
Production	80,800	80,800	86,870	86,870	93,900	94,880
MY Imports	272	272	17	17	10	10
TY Imports	199	199	17	17	10	10
TY Imp. from U.S.	0	0	0	0	0	0
Total Supply	97,192	97,192	102,247	102,247	113,860	114,840
MY Exports	72	72	891	891	6,500	6,500
TY Exports	74	74	1,699	1,699	8,500	8,500
Feed and Residual	2,900	2,900	3,100	3,100	3,600	3,600
FSI Consumption	78,860	78,860	78,306	78,306	81,810	81,810
Total Consumption	81,760	81,760	81,406	81,406	85,410	85,410
Ending Stocks	15,360	15,360	19,950	19,950	21,950	22,930
Total Distribution	97,192	97,192	102,247	102,247	113,860	114,840
Yield	3.	2.8391	3.	2.9548	3.	3.1957
TS=TD		0		0		0

Table 3. India: Commodity, Corn, PSD

(Area in Thousand Hectares, Others in Thousand Metric Tons)

Corn India	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Nov 2010		Market Year Begin: Nov 2011		Market Year Begin: May 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	8,600	8,600	8,670	8,670	8,750	8,510
Beginning Stocks	453	453	576	576	580	588
Production	21,730	21,730	21,570	21,760	20,600	20,500
MY Imports	19	19	3	5	10	10
TY Imports	24	24	3	3	10	10
TY Imp. from U.S.	0	0	0	0	0	0
Total Supply	22,202	22,202	22,149	22,341	21,190	21,098
MY Exports	3,526	3,526	4,569	4,553	3,000	3,000
TY Exports	3,376	3,376	4,674	4,657	3,000	3,000
Feed and Residual	9,000	9,000	8,600	8,800	9,000	9,200
FSI Consumption	9,100	9,100	8,400	8,400	8,500	8,500
Total Consumption	18,100	18,100	17,000	17,200	17,500	17,700
Ending Stocks	576	576	580	588	690	398
Total Distribution	22,202	22,202	22,149	22,341	21,190	21,098
Yield	3.	2.5267	2.	2.5098	2.	2.4089
TS=TD		0		0		0