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## India

### Grain and Feed

### Annual

### 2009

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**Report Highlights:**

Back-to-back record wheat and rice harvests and strong government procurement in response to hikes in minimum support prices and a continuing ban on rice and wheat exports resulted in a significant build up in government grain stocks. Stocks are projected to peak to a near record level of 52 million tons (33 million tons wheat and 19 million tons rice) by June 1, 2009, which could prompt the government to relax export restrictions and even provide an export subsidy for wheat in MY 2009/10. However, the government's food security objective was achieved at the cost of higher consumer prices, reduced domestic consumption, a larger food subsidy bill, and disruptions in domestic and global trade. Although the export ban on corn was lifted in October 2008, exports are not moving due to higher domestic prices vis-à-vis world prices, due in part to the government's high corn support price. Pulse imports in MY 2008/09 are estimated to decline due to high international prices and large stocks held with government parastatals involved in pulse imports, but are forecast to increase in MY 2009/10.

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Includes PSD Changes: Yes  
Includes Trade Matrix: Yes  
Annual Report  
New Delhi [IN1]  
[IN]

## Table of Contents

<b>WHEAT</b> .....	<b>3</b>
Production.....	4
Consumption .....	5
Trade .....	7
Stocks .....	7
Marketing .....	8
Policy.....	8
<b>RICE</b> .....	<b>11</b>
Production.....	12
Consumption .....	13
Trade .....	14
Stocks.....	15
Marketing .....	15
Policy.....	15
<b>COARSE GRAINS</b> .....	<b>18</b>
Production.....	18
Consumption .....	18
Trade .....	19
Marketing .....	19
Policy.....	19
<b>PULSES</b> .....	<b>20</b>
Production.....	20
Consumption .....	21
Trade .....	21
Marketing .....	21
Policy.....	22

## WHEAT

Table 1: Commodity, Wheat, PSD

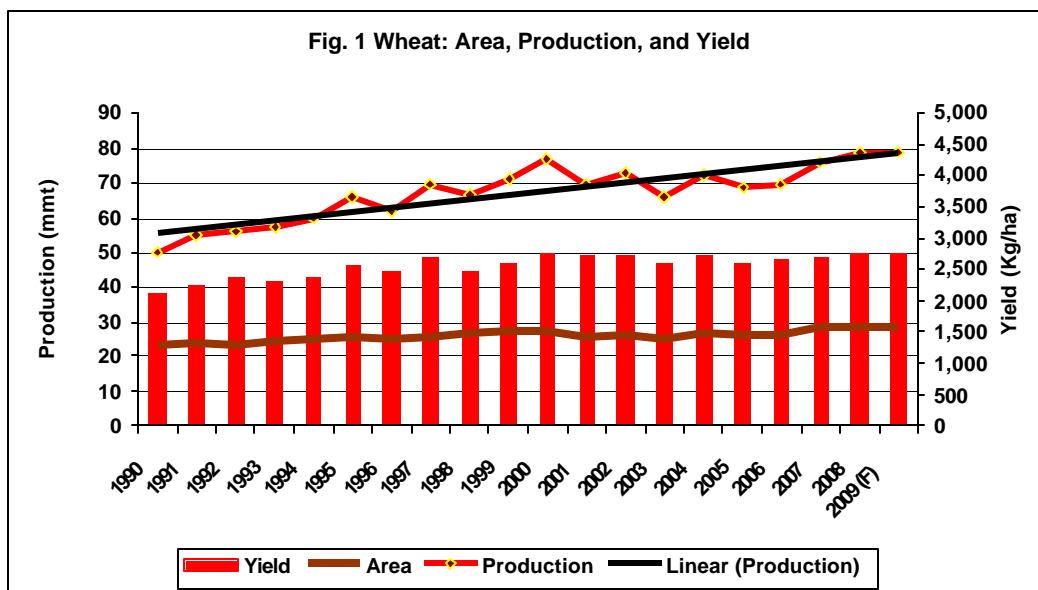
Wheat India	2007			2008			2009			
	2007/2008			2008/2009			2009/2010			
	Market Year Begin: Apr 2007			Market Year Begin: Apr 2008			Market Year Begin: Apr 2009			
	Annual Data Displayed		New Post	Annual Data Displayed		New Post	Annual Data Displayed		Feb	
			Data			Data			Data	
Area Harvested	28,000	28,200	28,000	28,150	28,150	28,150			28,400	(1000 HA)
Beginning Stocks	4,500	4,500	4,500	6,410	5,800	5,800			14,000	(1000 MT)
Production	75,810	75,810	75,810	78,400	78,400	78,600			79,000	(1000 MT)
MY Imports	1,881	2,000	1,793	0	0	0			0	(1000 MT)
TY Imports	1,881	1,800	1,800	0	0	0			0	(1000 MT)
TY Imp. from U.S.	0	0	0	0	0	0			0	(1000 MT)
Total Supply	82,191	82,310	82,103	84,810	84,200	84,400			93,000	(1000 MT)
MY Exports	50	50	50	200	200	100			2,000	(1000 MT)
TY Exports	43	50	50	300	300	100			2,000	(1000 MT)
Feed Consumption	200	200	200	100	100	100			100	(1000 MT)
FSI Consumption	75,531	76,260	76,053	77,500	70,900	70,200			72,400	(1000 MT)
Total Consumption	75,731	76,460	76,253	77,600	71,000	70,300			72,500	(1000 MT)
Ending Stocks	6,410	5,800	5,800	7,010	13,000	14,000			18,500	(1000 MT)
Total Distribution	82,191	82,310	82,103	84,810	84,200	84,400			93,000	(1000 MT)
Yield	3.	3.	2.7075	3.	3.	2.7922			2.7817	(MT/HA)

**Production**

India is heading for back-to-back record wheat harvests aided by a marginal increase in planted area and near optimal growing condition so far. Post currently forecasts 2009 wheat production at 79 million tons from 28.4 million hectares compared with the government’s revised 78.6 million tons from 28.2 million hectares last year. The government’s preliminary estimate pegs 2009 production somewhat lower than Post estimate at 77.8 million tons, which is likely to be revised upward later. Wheat planting was mostly on time supported by favorable soil moisture conditions following normal monsoon rains. Although the minimum support price (MSP) announcement by the government of India (GOI) this year was too late to influence farmers’ planting decision, last year’s higher support price itself provided an impetus to planting. The GOI’s recent emphasis on increasing wheat production through a National Food Security Mission (NFSM) will also have a positive, albeit small, impact on wheat output.

Despite favorable growing conditions so far, factors which could adversely affect the final quantity and quality of 2009/10 wheat production include an early or sudden rise in temperature or rains and hail at harvest time. Winter rains were deficient in most wheat growing regions, which could impact yields, particularly in the non-irrigated wheat growing regions of Madhya Pradesh and Gujarat. Hence, Post does not anticipate a significant yield growth this year from the 2008 record yield of about 2,785 kg per hectare. Approximately 88 percent of India’s wheat area has irrigation facilities, confined mostly in the states of Punjab, Haryana and Uttar Pradesh. Winter rains and cool temperatures are critical for realizing higher yields in the other producing states.

Indian wheat is largely a soft/medium hard, medium protein, white bread wheat, somewhat similar to U.S. hard white wheat. Wheat grown in central and western India is typically hard, with high protein and high gluten strength. India also produces around 1.5 million tons of durum wheat, mostly in the state of Madhya Pradesh. However, Indian durum is not marketed separately due to segregation problems at the market yard.



Although wheat production remained below the trend line during most of this decade, it is back on the trend path in recent years (Fig. 1). While potential exists to increase wheat

yields in most states, realizing that potential is hampered by lack of irrigation, a poor seed replacement rate, and low input use. The existing wheat varieties, released nearly a decade ago are showing signs of fatigue. New varieties with higher yield potential and better grain qualities released by the Indian wheat research institutes and agricultural universities in recent years are yet to reach farmers in adequate volumes, due to poor seed multiplication facilities. While not currently the case. Late harvest of sugarcane in the major sugarcane-wheat belt of Uttar Pradesh typically delays wheat planting, lowering yields in this largest wheat growing state. Furthermore, in recent years wheat production has become more vulnerable to changing climatic conditions characterized by an earlier-than-normal rise in surface temperatures coinciding with the grain filling stage. Although Indian scientists realize that biotechnology can be a valuable tool to withstand biotic and abiotic stress in the wheat plant, at present there is little focus on applying biotechnology to wheat, except for some experimental marker-assisted breeding.

While the growth momentum of wheat production following the Green Revolution was the cornerstone of India's food security, stagnation in production in recent years is a matter of serious concern to the government. This has prompted the GOI to shift focus from its earlier objective of crop diversification to increased production of wheat and rice. The GOI last year launched a National Food Security Mission (NFSM) (<http://nfsm.gov.in/>) which aims to increase the country's wheat, rice, and pulse production by 8, 10 and 2 million tons respectively by the end of the 11<sup>th</sup> Five Year Plan (2011/12) to ensure food security. Since a further significant growth in wheat area is unlikely due to increased competition from competing oilseed and pulse crops (which are also in short supply), the approach of the NFSM is to bridge the yield gap through dissemination of improved technologies and farm management practices. However, the success of such programs will largely depend on effective implementation by states as agriculture is a state-level subject in India.

A major challenge facing Indian wheat production in the near future is the likely invasion of the dreaded wheat rust Ug99, which according to experts could hit Indian soil in two to three years. Although other types of rust (yellow, brown, and some black) commonly occur in the country, these are mostly under control as Indian wheat breeders have developed varieties resistant to such rusts. The Indian Council of Agricultural Research (ICAR), India's apex agricultural research agency, is continuously surveying and monitoring the wheat crop for the presence of various rusts, including Ug99. The ICAR, as a proactive measure, is screening newly released wheat varieties in the country as well as varieties in the pipeline against the Ug99 stem rust under epiphytotic conditions of disease in Kenya for the last two years and has identified some resistant Indian varieties. However, most popular local varieties such as PBW 343 are not resistant to Ug99. Although Indian agricultural scientists claim that the agro-climatic conditions prevailing in the major wheat belt of north India are not conducive to the spread of Ug99, some other experts argue that climatic change and the highly mutative nature of the Ug99 strain could make Indian wheat vulnerable to this rust, as more than three-fourths of the wheat planted in India is highly susceptible to Ug99.

## Consumption

Despite record wheat production in 2008, wheat consumption in MY 2008/09 is estimated to have declined to around 70.2 million tons from 76.2 million tons in the previous year as most of the wheat surplus was procured by the government by offering a high support price and restricting the private trade from participating in wheat buying. A significant increase in the minimum support price for wheat, due to food security concerns, caused domestic open market wheat prices to rise, discouraging consumption. An ongoing economic recession and some state government's highly subsidized rice distribution program also tempered wheat consumption in major rice consuming states. Although the GOI is now making wheat available to bulk users at cost plus prices through an open market sale program, the

response has been lukewarm as government wheat sale prices under this program are not significantly lower than the open market prices for similar quality and the sales process is considered to be highly bureaucratic and cumbersome by the private trade. Wheat consumption in MY 2009/10 is also likely to remain subdued due to a further significant increase in the MSP for wheat, which would translate into even higher open market prices.

**Table 2: Government Support Price and Issue Price of Wheat**

Marketing Year (Apr – Mar)	Support Price Rs. per ton	PDS Issue Price Rs. per ton			Food Subsidy Rs. Billion
		APL	BPL	AAY	
2001/02	6,100	8,300	4,150	2,000	175.0
2002/03	6,200	6,100	4,150	2,000	241.8
2003/04	6,300	1/ 6,100	4,150	2,000	251.8
2004/05	6,300	6,100	4,150	2,000	258.0
2005/06	6,400	6,100	4,150	2,000	230.8
2006/07	6,500	6,100	4,150	2,000	240.1
2007/08	8,500	6,100	4,150	2,000	313.3
2008/09	10,000	6,100	4,150	2,000	436.3
2009/10	10,800				2/ 424.9

1/Rs. 5,100 during April 1, 2002 June 30, 2002

2/Budgeted, Actual expected to be higher.

Note: Current exchange rate is Rs. 48.9 = US\$ 1

PDS = Public Distribution System; APL = Above Poverty Line

BPL = Below Poverty Line

AAY = *Antyodaya Anna Yojana* (Poorest of the Poor)

Despite the high support price, which increased by a whopping 66 percent in the past three years, there has been no revision to the government sales price of wheat under various Public Distribution System (PDS) programs since July 2002 (Table 2). While the policies relating to the MSP for agricultural crops and the central issue price for the PDS served the twin objectives of providing remunerative prices to farmers and affordable prices to some consumers, the spread between the government's economic cost and the issue price of wheat and rice has widened leading to a surge in the food subsidy in recent years.

Government wheat sales prices are Rs. 6,100 (\$125) per ton for the Above Poverty Line (APL) clientele, Rs. 4,150 (\$85) per ton for the Below Poverty Line (BPL) clientele, and Rs. 2,000 (\$41) per ton for the poorest-of-the-poor (*Antyodaya Anna Yojana*) clientele against the government's cost price of Rs. 13,713 (\$280) per ton in 2007/08. Rising procurement costs without an increase in sales prices is pushing up food subsidy spending, which reached Rs. 436.3 billion (\$9.0 billion) in Indian Fiscal Year (IFY) 2008/09, and is expected to increase further in IFY 2009/10 due to the large hike in the support price without any increase in the sales price and higher storage costs.

Most wheat consumption in India is in the form of homemade *chapattis* or *rotis* (unleavened flat bread), using custom milled *atta* (whole meal flour). Use of branded and packaged *atta*, marketed by large companies, is increasing in cities. There are around 1,000 medium-to-large flourmills in India, with a milling capacity of around 24 million tons, which manufacture mostly *maida* (flour), semolina, and residual flour to cater to institutional demand. Processing 10 to 12 million tons annually, the average capacity utilization by these mills is only around 50 percent. The balance of production, after retention for seed/feed by farmers,

is custom milled mostly in the *chakkies* (small flour mills). Typically whole wheat is distributed through the public distribution system.

## Trade

Post currently forecasts MY 2009/10 wheat exports at two million tons, commercial or government-to-government. A significant build up in government wheat stocks following record government procurement of 22.7 million tons in MY 2008/09 and the possibility of another record procurement this year could prompt the government to remove the wheat export ban, which was in place since February 2007. However, the high domestic price of Indian wheat, due in part to the government's significant hike in the MSP last year and this year, would make Indian wheat uncompetitive in the world market. According to trade sources, the F.O.B price of Indian wheat would work out to be around \$300 per ton, considering various state taxes and levies, transportation costs, and FOB charges on top of the high MSP. At this price there won't be many international buyers for Indian wheat, unless there is a large government subsidy or global wheat prices strengthen. Inadequate availability of storage space in the major rice-wheat surplus states of Punjab and Haryana in north India, however, could force the government to export wheat, even if it involves a subsidy.

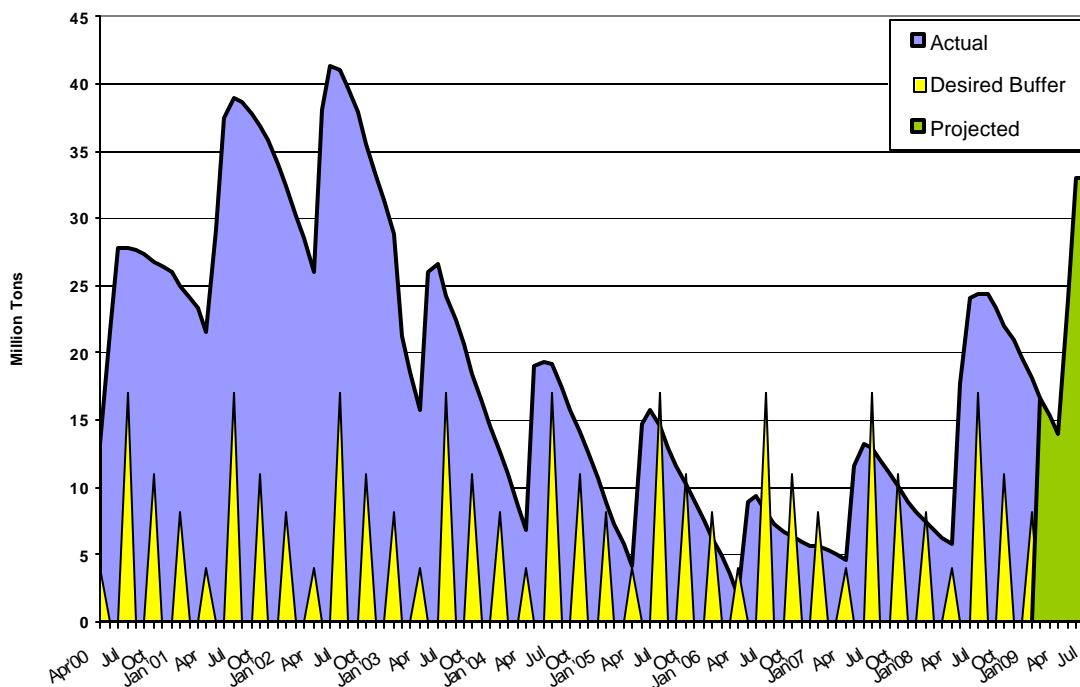
Although the government allocated two million tons of wheat from its stocks for exports in MY 2008/09, there were no large commercial sales, except for small, humanitarian exports to neighboring countries. The GOI recently promised to supply 250,000 tons of wheat to Afghanistan as food aid to be shipped as soon as the Afghanistan government works out transportation arrangements. However, it is unclear how the wheat will reach Afghanistan as Pakistan does not permit transshipment of Indian wheat through its territory due to quarantine concerns and other reasons. Alternative arrangements such as shipping wheat to an Iranian port and trucking it to Afghanistan could prove to be prohibitively expensive. Another alternative would be to convert the wheat to biscuits and ship it in containers, which India has once done in the past.

After importing wheat in MY 2006/07 (6.2 million tons) and 2007/08 (1.8 million tons), India did not import any wheat in MY 2008/09 as the domestic supply situation improved considerably.

## Stocks

Government-held wheat stocks, a major determinant of the government's wheat trade decisions, are projected at around 14 million tons on April 1, 2009, compared with 5.8 million tons on April 1, 2008. The government's desired April 1 buffer stock level is 4 million tons. With the government wheat procurement likely to remain high at over 22 million tons in MY 2009/10 for reasons explained earlier, government wheat stocks could swell to around 33 million tons on June 1, 2009, (Fig. 2), larger than the combined wheat production of Australia and Argentina. However, this is still lower than the highest June 1 wheat stocks of 41.3 million tons in 2002, when India started exporting wheat at highly subsidized prices. Estimates of private-held wheat stocks are not available, but are expected to be minimal. The PS&D table does not include private-held stocks.

Fig. 2 India: Wheat Stocks - Actual Vs. Desired Buffer



## Marketing

Despite numerous discussions at technical and policy levels, U.S. wheat still cannot be exported to India. The government's unreasonable phytosanitary requirement pertaining to 31 quarantine weed seeds (total 100 quarantine seeds per 200 kilogram wheat sample drawn from a single consignment) has effectively banned U.S. wheat shipments to India and forced other exporters to raise bid prices to cover excessive cleaning costs and the risk of cargo rejection in India. As a result, Indian importers pay a significantly higher price than other importing nations for similar or lower quality wheat. Furthermore, Indian consumers are denied access to their preferred white wheat.

The Indian wheat-based food industry is modernizing and the fast food industry is growing rapidly, both of which generate demand for specialty flours (used in pizzas and burger buns) that require varieties of wheat that India does not grow. There is rising consumption of wheat in south India due to increased urbanization.

## Policy

Wheat imports by the government currently attract a zero import duty. The domestic wheat shortage and higher prices forced the government to lower the duty on wheat imports by the private trade to 5 percent from 50 percent effective June 28, 2006, and further to zero percent effective September 9, 2006, until February 28, 2007, which was further extended up to December 31, 2008. On February 9, 2007, the GOI banned exports of wheat and wheat products until December 31, 2007, which was further extended indefinitely on October 8, 2007.



The GOI has permitted states to impose stock limits on the private trade of wheat under the Essential Commodities Act and has banned futures trading in wheat to check wheat prices. Last year, the government asked large trading companies operating in India to declare their stock levels. With the wheat supply situation improving, it is likely that the government will lift all trade and stock limits on the private trade after the harvest of the new crop in May 2009.

**Table 3: Commodity, Wheat, Import Trade Matrix**

<b>Country</b>	India		
<b>Commodity</b>	Wheat		
Time Period	Apr-Mar	Units:	MT
Imports for:	2007		2008
U.S.	0	U.S.	0
Others		Others	
Russia	781,728		
Argentina	413,996		
Canada	314,813		
Ukraine	130,362		
Brazil	95,248		
Pakistan	51,094		
Australia	5,893		
Nepal	75		
Total for Others	1,793,209		0
Others not Listed	0		0
Grand Total	1,793,209		0

Table 4: Commodity, Wheat, Prices Table

Prices Table			
Country	India		
Commodity	Wheat		
Prices in	Rupees	per uom	100 Kg
Year	2007	2008	% Change
Jan	1,080	1,110	3%
Feb	1,040	1,120	8%
Mar	1,040	1,115	7%
Apr	950	1,065	12%
May	915	1,075	17%
Jun	950	1,085	14%
Jul	1,025	1,100	7%
Aug	1,020	1,100	8%
Sep	1,020	1,090	7%
Oct	1,030	1,100	7%
Nov	1,030	1,140	11%
Dec	1,030	1,140	11%
Exchange Rate	Rs. 48.90	Local Currency/US \$	
Date of Quote	2/12/2009	MM/DD/YYYY	
Month-end Delhi Wholesale Price for Common Wheat			
Source: Department of Consumer Affairs, GOI			

## RICE

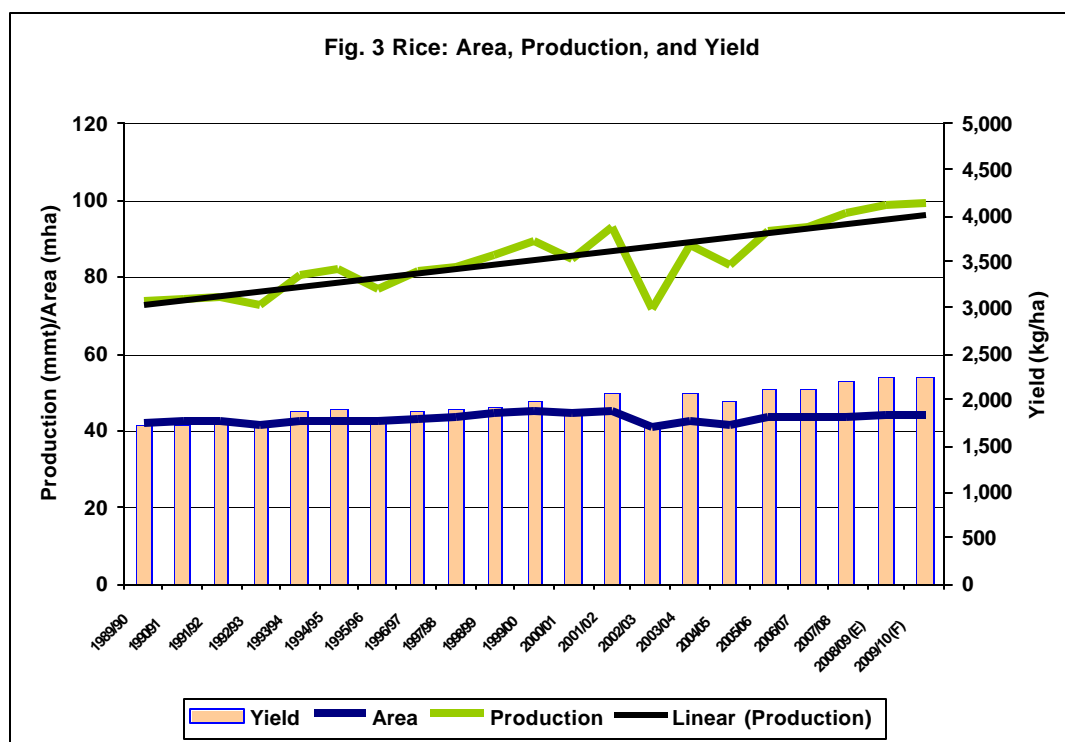
Table 5: Commodity, Rice, Milled, PSD

Rice, Milled India	2007			2008			2009		
	2007/2008			2008/2009			2009/2010		
	Market Year Begin: Oct 2007			Market Year Begin: Oct 2008			Market Year Begin: Oct 2009		
	Annual Data Displayed		New Post	Annual Data Displayed		New Post	Annual Data Displayed		Feb
			Data			Data			Data
Area Harvested	44,000	44,000	43,770	44,500	44,500	44,000		44,100	(1000 HA)
Beginning Stocks	11,430	11,430	11,430	13,000	13,000	13,000		17,000	(1000 MT)
Milled Production	96,430	96,430	96,690	97,500	97,500	98,900		99,500	(1000 MT)
Rough Production	144,659	144,659	145,050	146,265	146,265	148,365		149,265	(1000 MT)
Milling Rate (.9999)	6,666	6,666	6,666	6,666	6,666	6,666		6,666	(1000 MT)
MY Imports	0	0	0	0	0	0		0	(1000 MT)
TY Imports	0	0	0	0	0	0		0	(1000 MT)
TY Imp. from U.S.	0	0	0	0	0	0		0	(1000 MT)
Total Supply	107,860	107,860	108,120	110,500	110,500	111,900		116,500	(1000 MT)
MY Exports	4,500	4,500	4,500	2,000	2,000	2,500		4,000	(1000 MT)
TY Exports	3,300	3,000	3,300	2,500	2,500	2,500		4,000	(1000 MT)
Total Consumption	90,360	90,360	90,620	93,000	93,000	92,400		93,000	(1000 MT)
Ending Stocks	13,000	13,000	13,000	15,500	15,500	17,000		19,500	(1000 MT)
Total Distribution	107,860	107,860	108,120	110,500	110,500	111,900		116,500	(1000 MT)
Yield (Rough)	3.	3.	3.3139	3.	3.	3.3719		3.3847	(MT/HA)

**Production**

Assuming normal weather conditions, Post forecasts MY 2009/10 rice production, for which planting will start after the onset of monsoon in June, at 99.5 million tons from 44.1 million hectares. The GOI’s increased emphasis on rice production through the National Food Security Mission and increasing, but still limited, adoption of hybrid rice cultivation plus System of Rice Intensification techniques should support higher production.

Notwithstanding serious floods in major rice growing states such as Bihar, Orissa, and Andhra Pradesh, the government’s recently released second advance estimate placed MY 2008/09 rice production at 98.9 million tons (85.5 million tons *kharif* and 13.4 million tons *rabi*), 2.2 million tons higher than the revised MY 2007/08 output of 96.7 million tons. Although rice production has been showing a steady upward trend since the late 80’s, typically rice production is more volatile compared to wheat as a poor monsoon could bring this substantially non-irrigated crop (only around 52 percent of the crop has assured irrigation) down by as much as 10 million tons in a single season.



Because much of the rice crop is rain-fed (except for the major rice surplus states of Punjab, Haryana, Andhra Pradesh, and Tamil Nadu which use irrigation), production is subject to wide year-to-year fluctuations. However, since 2004/05, rice production has shown steady growth, above the trend line, largely due to an increase in productivity (Fig.3). Nevertheless, Indian rice yields are still well below the world average, implying there is potential for increasing production. However, many scientists have expressed concern that current Indian rice production techniques cannot sustain the growing domestic population. Another challenge facing Indian rice production is the impact of climate change.

Use of high-yielding seed varieties is largely confined to the states that use irrigation. Fertilizer application at the national level is not high, but is near optimum in these states. Area under hybrid rice, developed mostly by private seed companies, is estimated to have

increased from 10,000 hectares in 1995 to 1.3 million hectares presently, concentrated mostly in eastern Uttar Pradesh, Bihar, Jharkhand, and Chhattisgarh.

The major challenge facing hybrid rice seed producers in India is the vast diversity in consumer preference for rice, making it difficult to develop the right type of hybrids on a commercial scale. Nevertheless, several hybrid seed varieties with specific consumer-preferred grain quality characteristics are reportedly under development both by government research institutes and by private companies. Commercial production of these hybrids should accelerate hybrid rice adoption by Indian farmers. Furthermore, the National Food Security Mission contains a target to cover 3 million hectares of rice area under hybrid rice by the year 2011-12, to achieve the objective of increasing rice production by 10 million tons by 2011-12. Efforts are underway to develop transgenic rice varieties and hybrids to incorporate resistance to various pests and diseases. However, this research is being done mostly by private seed companies and approval and commercialization of transgenic rice is still years away.

Some of the surplus rice growing states in the north are attempting to diversify the intensive rice/wheat rotation due to ecological concerns such as a low water table and soil health. However, a significant shift is not imminent in the absence of a more profitable rotation and due to the government's renewed emphasis on rice and wheat production for food security reasons by offering higher MSPs and other incentives. The "System of Rice Intensification" technology, which requires less irrigation and uses more organic manures, is becoming popular in some rice growing states.

Considering the adverse impact of continuous rice/wheat rotation in the Gangetic plains of north India, a USAID-supported 'Rice –Wheat Consortium for the Indo-Gangetic Plains' (RWC), an eco-regional program of the Consultative Group of International Agricultural Research (CGAIR) and its national partners, was established in 1994. The aim is to improve rice and wheat production in South Asian countries and to address the issue of natural resource management and productivity constraints in the region. Among other things, the RWC is developing technologies and policies to improve productivity, soil health and enhanced diversity of the rice-wheat systems in this region, which include zero tillage in wheat and direct-seeded rice.

## Consumption

Despite larger rice production in MY 2008/09, open market rice prices remained high, as most of the surplus rice was procured by the government at a high support price. To overcome the high rice prices in the open market, the government is allocating more rice from its stocks for distribution through the PDS, somewhat offsetting the reduced consumption outside the PDS. Furthermore, most major rice consuming states have initiated programs to supply rice to the vulnerable section of the population at highly subsidized prices. As a result, rice consumption in MY 2008/09 is estimated somewhat higher at 92.4 million tons compared to 90.6 million ton in MY 2007/08.

More than 4,000 varieties of rice are grown in India to meet varied consumer preferences. For government procurement purposes, however, rice is classified into two categories: common (length to breadth ratio less than 2.5) and Grade A (length to breadth ratio more than 2.5). Historically, most government-procured rice came from millers who were obliged to sell the government a portion of their milled rice (ranging from 75 percent in Punjab and Haryana to 50 percent in Andhra Pradesh, and even lower in marginal surplus states) at established rates, called the "levy price," which is linked to the support price of paddy and milling costs. But in recent years, most of the procurement by the government has been in

the form of paddy bought at the support price, which the government then has custom milled.

With a view to maximize procurement due to food security concerns, the GOI increased the MSP for paddy (un-milled rice) for MY 2008/09 by 20 percent to Rs. 9,000 (\$184) per ton for Common varieties and Rs. 9,300 (\$190.5) per ton for Grade A varieties. As in the case of wheat, the government has not increased the sales price of rice distributed through the PDS since July 1, 2002, although the support price has increased by around over 60 percent since then (Table 6), further contributing to the increasing food subsidy.

**Table 6: Government Support Price of Paddy and Issue Price of Rice**

Marketing Year (Oct-Sep)	Support Price for Paddy (Un-milled rice) Rs. per ton		PDS Issue Price for Milled Rice Rs. Per ton		
	Common	Grade A	APL (Common/ Grade A)	BPL	AAY
2000/01	5,100	5,400	10,870/11,300	5,650	3,000
2001/02	5,300	5,600	7,950/8,300	5,650	3,000
2002/03	5,500	5,800	7,950/8,300	5,650	3,000
2003/04	5,500	5,800	7,950/8,300	5,650	3,000
2004/05	5,600	5,900	7,950/8,300	5,650	3,000
2005/06	5,700	6,000	7,950/8,300	5,650	3,000
2006/07	6,200	6,500	7,950/8,300	5,650	3,000
2007/08	7,450	7,750	7,950/8,300	5,650	3,000
2008/09	9,000	9,300			

Note: Current exchange rate is Rs. 48.90 = 1 US\$

APL = Above Poverty Line; BPL = Below Poverty Line; AAY – Antyodaya Anna Yojana (Poorest of the Poor)

Government domestic rice procurement during MY 2008/09 up to February 6, 2009, is ahead of last year by 3.2 million tons at 21.2 million tons. Total MY 2008/09 procurement is likely to reach a new record of over 30 million tons (almost one third of total Indian production), compared with 28.5 million tons in MY 2007/08.

## Trade

The level of MY 2008/09 and CY 2009 rice exports will depend on if and when the government lifts the ban on rice exports. According to trade sources, with the national election due in the next two to three months, the government is unlikely to remove export restrictions on non-basmati rice in the near future (except for small consignments to poorer countries on humanitarian grounds) due to concerns about food price inflation. However, export restrictions on the high priced basmati rice could be eased further. Assuming the export ban will be lifted after elections in the second half of 2009, Post forecasts MY 2008/09 and CY 2009 exports at 2.5 million tons. However, burgeoning government stocks of both wheat and rice and the resultant storage problems could prompt the government to further relax export restrictions and result in increased exports in MY 2009/10 and CY 2010, currently forecast at four million tons.

Based on preliminary official trade data, India's CY 2008 rice exports through September totaled close to three million tons. With some additional shipments of basmati rice during

the fourth quarter, exports could reach around 3.3 million tons compared to 6.3 million tons in CY 2007. Most of the non-basmati rice exports in CY 2008 were to Bangladesh as, despite export ban, the government permitted exports of 551,000 tons of rice to this country, which included 500,000 in the aftermath of Cyclone Sidr last year.

### Stocks

Government-held rice stocks on October 1, 2008, were 7.9 million tons, against 5.5 million tons a year ago. Following brisk rice procurement in MY 2008/09, rice stocks rose to 17.6 million tons on January 1, 2009, compared to 11.5 million tons on January 1, 2008, well above the GOI's January 1 minimum buffer stock level of 11.8 million tons. The record for January 1 stocks was 25.6 million tons in 2002. Stocks are projected at around 13 million tons on October 1, 2009. The PS&D table includes both government stocks and estimated privately-held stocks.

### Marketing

Although Indian low-quality white rice exports do not pose a direct challenge to U.S. rice exports, Indian high-quality basmati competes against U.S. rice in several markets, particularly in the European Union and in the Middle East. Indian export restrictions on rice helped the United States to increase its market share in several markets.

### Policy

Concerns about food price inflation prompted the Indian government to impose various restrictions on rice exports over the past 18 months. Export conditions for both non-basmati and basmati rice have undergone several changes during this period, which created uncertainty among Indian rice traders and affected the competitiveness of Indian basmati rice in the global market. Table 7 shows the chronology of Indian rice export restrictions:

**Table 7: Chronology of Indian Rice Export Restrictions**

Effective Date	Restriction
October 9, 2007	GOI bans export of non-basmati rice; exports under food aid programs exempted from the ban.
October 31, 2007	The export ban is replaced by a minimum export price (MEP) of \$425 per ton FOB
December 27, 2007	MEP on non-basmati rice increased to \$500 per ton
March 5, 2008	MEP on non-basmati rice hiked to \$650 per ton; MEP on basmati rice established at \$950 per ton.
March 17, 2008	Basmati rice exports restricted to Mundra and Pipavav ports only.
March 27, 2008	MEP on non-basmati rice hiked to \$1,000 per ton; MEP on basmati rice hiked to \$1,100 per ton.
April 1, 2008	Non-basmati rice exports completely banned; MEP on basmati rice hiked to \$1,200 per ton. Basmati rice exports restricted to the ports of Kandla, Kakinada, Kolkata, JNPT Mumbai, Mundra, and Pipavav.
April 29, 2008	An export tax of Rs. 8,000 per ton imposed on

	<b>basmati rice.</b>
<b>January 20, 2009</b>	<b>Export tax abolished and MEP reduced to \$1,100 per ton.</b>

Concerned over the diminishing global demand for Indian basmati rice in the face of stiff competition from lower priced Pakistani origin basmati rice, on January 20, 2009, a Ministerial Committee of the government decided to abolish the export duty of Rs. 8,000 (\$163) per ton applicable to basmati rice and to lower the minimum export price (MEP) by \$100 per ton to \$1,100 per ton. Futures trading in rice is currently prohibited.

**Table 8: Commodity, Rice, Milled, Export Trade Matrix**

<b>Export Trade Matrix</b>				
<b>Country</b>		India		
<b>Commodity</b>		Rice, Milled		
Time Period		Jan-Dec	Units:	1000 MT
Exports for:		2007		2008 1/
U.S.		83	U.S.	29
Others			Others	
Bangladesh		1,570	Bangladesh	1,160
Cote D Ivories		707	Saudi Arabia	591
Saudi Arabia		632	UAE	346
UAE		427	Kuwait	131
South Africa		330	Nigeria	66
Nigeria		239	UK	57
Senegal		217	Sri Lanka	42
Guinea		192	South Africa	31
Somalia		142	Yemen	29
Cameroon		115	Somalia	29
Total for Others		4,571		2,482
Others not Listed		1,606		483
Grand Total		6,260		2,994
1/ January through September 2009 (Preliminary)				
Source: Directorate General of Commercial Intelligence & Statistics, GOI				



Table 9: Commodity, Rice, Milled, Prices Table

Prices Table			
Country	India		
Commodity	Rice, Milled		
Prices in	Rupees	per uom	100 Kg
Year	2007	2008	% Change
Jan	1,225	1,495	22%
Feb	1,190	1,525	28%
Mar	1,275	1,550	22%
Apr	1,200	1,400	17%
May	1,250	1,450	16%
Jun	1,300	1,550	19%
Jul	1,250	1,500	20%
Aug	1,250	1,625	30%
Sep	1,325	1,700	28%
Oct	1,400	1,700	21%
Nov	1,410	1,700	21%
Dec	1,415	1,700	20%
Exchange Rate	48.90	Local Currency/US \$	
Date of Quote	2/12/09	MM/DD/YYYY	
Month-end Delhi Wholesale Price for Common Rice			
Source: Department of Consumer Affairs, GOI			

## COARSE GRAINS

### Production

Assuming a normal monsoon this summer, MY 2009/10 coarse grain production is forecast at 39 million tons, compared to a drought-reduced output of 37.0 million tons in MY 2008/09, and record production of 40.8 million tons in MY 2007/08. The MY 2009/10 production forecast includes 18.5 million tons of corn, 7.5 million tons of sorghum, 11.5 million tons of millet, and 1.5 million tons of barley. However, monsoon rains will play a key role, as only 10 percent of the total coarse grain crop is irrigated.

Uneven rainfall in major coarse grain growing regions in 2008 resulted in a sharp decline in *kharif* (fall and early winter-harvested) coarse grain production, which was partially offset by a higher *rabi* season crop. According to the government's preliminary estimates, total coarse grain production in 2008/09 was 37.0 million tons, which included 17.0 million tons of corn, 7.2 million tons of sorghum, and the balance of mostly millet and some barley.

Corn production in India has shown a generally steady upward trend in recent years with increased coverage under hybrids. However, sorghum production has slowed, due to a shift in area from sorghum to soybeans and other commercial crops such as cotton. Millet production fluctuates widely from year-to-year depending on the monsoon, as it is almost entirely rain-fed. Barley production, which is a small winter crop in north India, has remained stagnant at around 1.3 million tons over the past several years. A decline in area due to a shift toward wheat was largely offset by increased yields. Production has failed to respond to increasing demand from India's growing malt-based beer and health food sectors, because of lower returns vis-à-vis wheat. Most of the barley production in India is feed type, six-row varieties, and unsuitable for malting. However, in recent years good malting type barley varieties have been developed under public-private breeding programs. Some malting and brewing companies have initiated contract farming of malting type barley in Haryana, Punjab, and Rajasthan.

### Consumption

Coarse grain consumption is forecast at around 38 million tons in MY 2009/10, almost 3 million tons higher than the MY 2008/09 level. Food use accounts for a major share of coarse grain consumption, particularly in the case of sorghum, millet, and barley. In the case of corn, however, 6 to 7 million tons (roughly 40 percent of total consumption) goes for feed use, primarily for poultry feed. Another 1.2 million tons of corn is used by the starch industry. Corn demand by the feed industry had been on the rise after the poultry sector recovered from avian influenza in early 2006. However, the recent outbreak of avian influenza in north east India and prevailing high corn prices are likely to have a negative impact on feed corn demand. Corn demand by the starch industry was on the upswing. However, the slowdown in the domestic and global economy is likely to reduce the demand for starch, mainly used by the textile industry.

The high tannin content in Indian sorghum restricts its use in poultry rations, while its use in the production of industrial alcohol and starch is reportedly increasing. Barley is used mainly for food and feed, although some better quality varieties are used in malting. The total quantity of barley required for malting purposes is estimated at 250,000 tons annually, growing at 10 percent per year. India does not produce any ethanol from cereal grains. Thus, there has been no impact resulting from the domestic ethanol program (which is based on molasses from sugar) on the domestic market for food, feed and trade of cereal grains and its byproducts.

Lower production and a significant increase in the corn support price from Rs. 6,200 per ton in MY 2007/08 to Rs. 8,400 (\$172) per ton in MY 2008/09 should keep corn and other coarse grain prices high.

### Trade

The government lifted the export ban on corn in mid-October 2008 and provided an export subsidy in the form of a 5 percent duty credit scrip on the F.O.B value of exports under the *Vishesh Krishi Upaj Yojana* (Special Agricultural Product Scheme). However, there were few buyers of Indian corn, as Indian corn prices remain uncompetitive in the world market, mainly because of a relatively high support price of Rs. 8,400 (\$172) per ton. Exports so far have been mostly confined to a few shipments to Malaysia, Sri Lanka, and Vietnam, totaling around 100,000 tons. Domestic corn prices are currently around Rs. 8,300 (\$170) per ton in producing areas, somewhat below the support price, which works out at over \$200 per ton F.O.B. However, according to trade sources, Indian corn is now becoming more competitive in Far Eastern and South East Asian markets as freight costs are increasing giving India an edge over Western Hemisphere exporters. Post estimates India's corn exports in MY 2008/09 at 400,000 tons.

There is a likelihood of a further upward revision in the corn support price in MY 2009/10, which would make Indian corn more expensive. Corn exports in MY 2009/10 will depend on whether Indian corn will remain competitive in the world market. Post currently forecasts exports at 500,000 tons.

Besides corn, Indian exporters have managed to export some barley, which according to trade sources could reach 200,000 tons in MY 2008/09 (Apr-Mar). Despite being a minor barley producing country with annual production of around 1.3 million tons, India began exporting barley in July 2007 following global shortages, making Indian exports feasible. According to trade sources, because of the current high global price for barley, Indian barley should remain competitive in the global market in MY 2009/10, as the increase in its MSP was only marginal at Rs. 6,800 (\$139) per ton vis-à-vis other *rabi* crops such as wheat, keeping domestic barley prices low. Post forecasts MY 2009/10 barley exports at 300,000 tons.

Although Indian traders were interested in importing some high quality U.S. barley for malting, current phytosanitary restrictions, which require freedom from ergot, do not permit imports. Consequently, traders have reportedly sourced small quantities of barley from Canada.

### Marketing

Although India currently does not import corn, the growth of the poultry and starch industries may eventually create a demand for imported corn. Recent experience shows that the government will abolish import duties to keep prices under control. Unlike wheat and rice, the government does not typically maintain a buffer stock of coarse grains to keep prices in check.

### Policy

In June 2000, the government established a TRQ for corn imports, under which up to 500,000 tons of corn may be imported annually, subject to an in-quota tariff of 15 percent; above-quota imports face a 50 percent duty. However, in February 2007, the government allowed duty free imports through December 2007 and also removed the TRQ until then to encourage imports.

After the domestic starch industry and local poultry industries voiced their concern over large exports of corn by private traders resulting in high domestic prices, on March 5, 2007, the GOI channeled exports of corn only through government parastatals for six months. However, concerned about the rising domestic price of corn in the face of increasing exports, effective July 3, 2008, the GOI banned exports of corn through October 15, 2008. This ban was not further extended after October 15 despite pressure from user industries.

The Ministry of Commerce and Industry, on April 7, 2006, announced a supplement to the GOI's Foreign Trade Policy (2004-2009), which requires all imports containing products resulting from modern biotechnology to receive prior approval via the Genetic Engineering Approval Committee (GEAC), as well as mandating a positive declaration stating that the product is "genetically modified." Importers are responsible for providing this declaration, and likewise are liable if the declaration is incorrect. Punitive action, in a case where the consignment does not carry the correct declaration, could be up to five times the value of the consignment.

On January 2, 2008, the Ministry of Agriculture proposed a draft Plant Quarantine (Regulation of Import into India) Order, 2008, which seeks to specify a somewhat relaxed condition for imports of barley grains for malting purposes, namely fumigation by phosphine instead of methyl bromide required for import of barley for other uses, although the zero tolerance for ergot was not relaxed.

Efforts to produce ethanol from other feed stocks like sweet sorghum, sugar beet, sweet potatoes, etc. are in an experimental stage.

## PULSES

### Production

India's MY 2009/10 (Apr/Mar) pulse production is forecast at 14.3 million tons, marginally lower than the revised MY 2008/09 production of 14.8 million tons. A significant decline in *kharif* season pulse production (mostly pigeon peas, mung beans, and black matpe), tentatively estimated by the government at 4.8 million tons compared to 6.4 million tons in the previous year, due to uneven monsoon rains in major growing areas, will be largely offset by higher production in the *rabi* season. According to preliminary planting data, area planted to *rabi* pulses, which include mostly chickpeas, lentils, and peas, at 13.8 million hectares, is almost one million hectares more than last year. Combined with generally favorable growing conditions, the area growth would result in a record production of around 9.5 million tons, compared with 8.4 million tons last year.

India is the world's largest producer of pulses, which are an integral part of the Indian diet, as they provide much-needed protein. Pulses are grown both in the *kharif* and *rabi* seasons, with almost two-thirds produced in the latter. Most pulses are grown under non-irrigated conditions, and depend largely on monsoon and winter rains for growth. Limited varietal improvements, low resilience to moisture stress and pest infestation, and a lack of government support programs have contributed to low yields. Madhya Pradesh, Uttar Pradesh, Maharashtra, Andhra Pradesh, and Karnataka together account for over 70 percent of the country's total pulse production, with Madhya Pradesh alone contributing around 24 percent. Pulse production has failed to respond to the steady increase in both support prices and open market prices, due to competition from more profitable and less risky crops such as wheat and rice. The government's National Food Security Mission aims to increase pulse production by 2 million tons by 2011/12, mostly through the supply of quality seeds and better agronomic practices.

## Consumption

Pulse consumption in MY 2009/10 is forecast to increase marginally from MY 2008/09 consumption due to better than normal production, larger carry over stocks of imported pulses with government parastatals, and likely larger imports. Despite the fact that India imports significant quantities of pulses, prices continue to remain high due to increasing total demand though per-capita pulse consumption is shrinking, as households substitute between pulses and other food groups based on relative prices and budget constraints. With a view to make pulses available to Indian consumers at a lower price, the GOI recently decided to supply one kilogram of pulses per month per family through the PDS incurring a subsidy of Rs. 10 per kilogram. According to some reports, the government is facing difficulty in launching the subsidized pulse distribution program through the PDS as most states are reluctant to take yellow peas, the cheapest pulse available in the world market and for which the public sector companies carry the largest stocks. Most states want traditional pulses such as pigeon peas, black matpe, and mung beans under this program.

## Trade

Pulse imports are forecast to increase somewhat to 2.4 million tons in MY 2009/10 from the MY 2008/09 level of 2.2 million tons, provided international prices declines. In MY 2008/09, imports are estimated to have declined significantly to 2.2 million tons from 2.95 million tons in MY 2007/08 due to higher international prices and larger domestic availability. According to official data, MY 2007/08 imports included 1.74 million tons of dry peas, 327,000 tons of mung beans, 313,000 tons of pigeon pea, 231,000 tons of lentils, and 146,000 tons of chick peas. Major suppliers were Canada, Myanmar, Russia, Ukraine, USA, and Australia. According to preliminary official data, imports during the first six months of MY 2008/09 were down by over 400,000 tons compared with the corresponding period of MY 2007/08. As India is a price buyer of pulses, there is resistance at high international prices. However, the typically higher priced U.S. green and yellow peas and lentils have become more price competitive in the Indian market in recent years due to domestic shortages and higher prices. As a result, imports of pulses from the U.S., mostly dry green peas and some yellow peas, witnessed significant growth during the past 5 years, reaching a record 210,000 tons in CY 2007, which declined marginally to 152,000 tons in CY 2008 valued at a record \$62.8 million, making India the largest market for U.S. pulses.

Another factor which could affect pulse imports from the U.S. as well as from Canada in the future is the fumigation requirement for the import of pulses. Effective January 1, 2004, pulse (chickpeas, peas) imports from all origins to India were subject to fumigation by methyl bromide at the port of loading apparently to protect domestic production from stem and bulb nematode, pea cyst nematode, and bruchids, per the Plant Quarantine Regulation of Import into India Order, 2003. As methyl bromide is being phased out due to environmental concerns in most countries, it would be difficult and costly to fumigate pulses with methyl bromide at the port of origin. Unless the fumigation requirement is modified, pulse exports from North America to India will be in jeopardy, which could further exacerbate the Indian pulse supply situation leading to a further significant rise in domestic pulse prices. Recently, the GOI extended up to March 31, 2009, the arrangement to import pulses shipped from the United States and Canada subject to fumigation by methyl bromide at the port of arrival in India.

## Marketing

India's "price buyers" of pulses are unwilling to pay a significant premium for higher U.S. quality, especially when lower-cost pulses are plentiful from other countries. Most U.S. type beans (navy beans, black beans, pintos, and lima beans), with the exception of green and

yellow peas and chickpeas, are relatively unknown in India. Keys to improving the U.S. position in the Indian pulse market include expanding the U.S. supply of peas and chickpeas and making it more price competitive vis-à-vis Canada, as India is likely to remain a significant market for pulses in the coming years.

### Policy

In a move to contain the rising prices of pulses in the domestic market, effective June 8, 2006, the Indian government exempted pulses from the applicable 10 percent import duty through March 31, 2009. Additionally, on January 23, 2007, the Indian government de-listed futures trading in *tur* (pigeon pea) and *urad* (mung beans) until further notice under the assumption that futures contract trading was responsible for the high prices of pulses. In May 2008, India banned futures trading in chickpeas for four months, which was later extended up to November 30, 2008. Several state governments have imposed stocks limits on pulses held by the private trade to control the price rise.

Effective June 22, 2006, the GOI imposed a ban on the export of pulses, with the exception of *kabuli chana* (garbanzos), which was later extended up to March 31, 2009. Meanwhile, the GOI has authorized government agencies/trading companies such as NAFED, STC, PEC, and MMTC to import pulses. Imports by these agencies would qualify for a subsidy of up to 15 percent. These import policy changes are designed to keep pulse prices from rising, but has discouraged private imports of pulses.

Table 10: Commodity, Corn, PSD

Corn India	2007			2008			2009			
	2007/2008			2008/2009			2009/2010			
	Market Year Begin: Nov 2007			Market Year Begin: Nov 2008			Market Year Begin: Nov 2009			
	Annual Data Displayed		New Post	Annual Data Displayed		New Post	Annual Data Displayed		Feb	
			Data			Data			Data	
Area Harvested	8,300	8,300	8,260	8,400	8,400	8,300		8,400	(1000 HA)	
Beginning Stocks	260	244	260	475	800	500		800	(1000 MT)	
Production	19,310	18,540	18,960	17,500	17,500	17,000		18,500	(1000 MT)	
MY Imports	5	0	0	0	0	0		0	(1000 MT)	
TY Imports	5	0	0	0	0	0		0	(1000 MT)	
TY Imp. from U.S.	0	0	0	0	0	0		0	(1000 MT)	
Total Supply	19,575	18,784	19,220	17,975	18,300	17,500		19,300	(1000 MT)	
MY Exports	2,200	3,000	4,500	250	250	400		500	(1000 MT)	
TY Exports	2,800	3,000	4,500	250	250	400		500	(1000 MT)	
Feed Consumption	6,700	6,500	6,700	6,500	6,500	6,400		6,700	(1000 MT)	
FSI Consumption	10,200	8,484	7,520	10,500	10,550	9,900		11,200	(1000 MT)	
Total Consumption	16,900	14,984	14,220	17,000	17,050	16,300		17,900	(1000 MT)	
Ending Stocks	475	800	500	725	1,000	800		900	(1000 MT)	
Total Distribution	19,575	18,784	19,220	17,975	18,300	17,500		19,300	(1000 MT)	
Yield	2.	2.	2.2954	2.	2.	2.0482		2.2024	(MT/HA)	

Table 11: Commodity, Sorghum, PSD

Sorghum India	2007			2008			2009			
	2007/2008			2008/2009			2009/2010			
	Market Year Begin: Nov 2007			Market Year Begin: Nov 2008			Market Year Begin: Nov 2009			
	Annual Data Displayed		New Post	Annual Data Displayed		New Post	Annual Data Displayed		Feb	
			Data			Data			Data	
Area Harvested	8,400	8,400	7,930	7,500	7,500	7,500			7,700	(1000 HA)
Beginning Stocks	247	247	247	232	232	232			247	(1000 MT)
Production	7,780	7,780	7,930	6,500	7,200	7,240			7,500	(1000 MT)
MY Imports	0	0	0	0	0	0			0	(1000 MT)
TY Imports	0	0	0	0	0	0			0	(1000 MT)
TY Imp. from U.S.	0	0	0	0	0	0			0	(1000 MT)
Total Supply	8,027	8,027	8,177	6,732	7,432	7,472			7,747	(1000 MT)
MY Exports	30	30	30	25	25	25			25	(1000 MT)
TY Exports	55	55	55	25	25	25			25	(1000 MT)
Feed Consumption	1,500	1,500	1,500	1,200	1,200	1,200			1,500	(1000 MT)
FSI Consumption	6,265	6,265	6,415	5,330	6,000	6,000			6,000	(1000 MT)
Total Consumption	7,765	7,765	7,915	6,530	7,200	7,200			7,500	(1000 MT)
Ending Stocks	232	232	232	177	207	247			222	(1000 MT)
Total Distribution	8,027	8,027	8,177	6,732	7,432	7,472			7,747	(1000 MT)
Yield	1.		1.	1.	1.	0.9653			0.974	(MT/HA)



Table 12: Commodity, Millet, PSD

Millet India	2007			2008			2009			
	2007/2008			2008/2009			2009/2010			
	Market Year Begin: Nov 2007			Market Year Begin: Nov 2008			Market Year Begin: Nov 2009			
	Annual Data Displayed		New Post	Annual Data Displayed		New Post	Annual Data Displayed		Jan	
			Data			Data			Data	
Area Harvested	10,800	10,800	10,800	11,000	10,500	10,000			10,500	(1000 HA)
Beginning Stocks	240	200	240	250	250	250			150	(1000 MT)
Production	12,410	12,410	12,410	12,000	10,500	10,500			11,500	(1000 MT)
MY Imports	0	0	0	0	0	0			0	(1000 MT)
TY Imports	0	0	0	0	0	0			0	(1000 MT)
TY Imp. from U.S.	0	0	0	0	0	0			0	(1000 MT)
Total Supply	12,650	12,610	12,650	12,250	10,750	10,750			11,650	(1000 MT)
MY Exports	0	0	0	0	0	0			0	(1000 MT)
TY Exports	0	0	0	0	0	0			0	(1000 MT)
Feed Consumption	1,000	1,000	1,000	1,100	1,000	1,000			1,200	(1000 MT)
FSI Consumption	11,400	11,360	11,400	10,900	9,600	9,600			10,200	(1000 MT)
Total Consumption	12,400	12,360	12,400	12,000	10,600	10,600			11,400	(1000 MT)
Ending Stocks	250	250	250	250	150	150			250	(1000 MT)
Total Distribution	12,650	12,610	12,650	12,250	10,750	10,750			11,650	(1000 MT)
Yield	1.	1.	1.1491	1.	1.	1.05			1.0952	(MT/HA)

Table 13: Commodity, Barley, PSD

Barley India	2007			2008			2009			
	2007/2008			2008/2009			2009/2010			
	Market Year Begin: Apr 2007			Market Year Begin: Apr 2008			Market Year Begin: Apr 2009			
	Annual Data Displayed		New Post	Annual Data Displayed		New Post	Annual Data Displayed		Feb	
			Data			Data			Data	
Area Harvested	770	770	770	750	750	750			780	(1000 HA)
Beginning Stocks	49	34	49	29	34	29			20	(1000 MT)
Production	1,330	1,330	1,330	1,400	1,250	1,230			1,500	(1000 MT)
MY Imports	0	0	0	0	0	0			0	(1000 MT)
TY Imports	0	0	0	0	0	0			0	(1000 MT)
TY Imp. from U.S.	0	0	0	0	0	0			0	(1000 MT)
Total Supply	1,379	1,364	1,379	1,429	1,284	1,259			1,520	(1000 MT)
MY Exports	350	150	200	0	150	200			300	(1000 MT)
TY Exports	200	150	200	0	150	200			300	(1000 MT)
Feed Consumption	100	100	100	100	100	100			100	(1000 MT)
FSI Consumption	900	1,080	1,050	1,300	1,004	939			1,000	(1000 MT)
Total Consumption	1,000	1,180	1,150	1,400	1,104	1,039			1,100	(1000 MT)
Ending Stocks	29	34	29	29	30	20			120	(1000 MT)
Total Distribution	1,379	1,364	1,379	1,429	1,284	1,259			1,520	(1000 MT)
Yield	2.		1.7273	2.		1.64			1.9231	(MT/HA)