



GIEWS Country Brief The Republic of India

Reference Date: 03-September-2024

FOOD SECURITY SNAPSHOT

- **Wheat production officially estimated at record level in 2024**
- **Total cereal exports forecast at below-average level in 2024/25 marketing year**
- **Prices of rice and wheat grain higher year-on-year in July 2024**

Wheat production officially estimated at record level in 2024

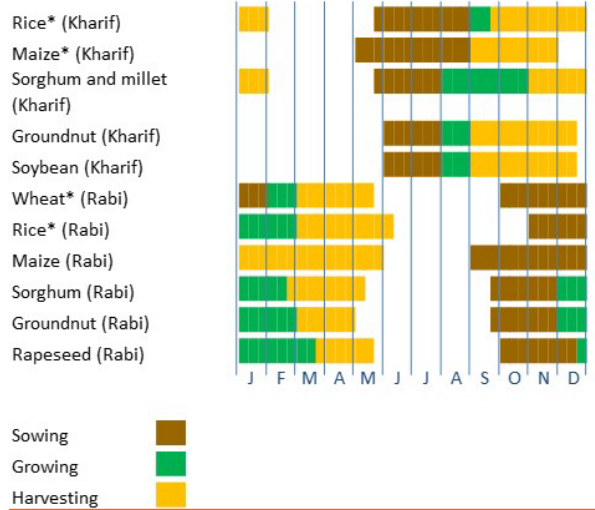
Harvesting of the 2024 *rabi* wheat crop, almost entirely irrigated, was concluded last May, with production officially estimated at a record level of 112.9 million tonnes. The area planted is estimated at an above-average level. Yields are also estimated at an above-average level, despite weather setbacks during the cropping season, especially the high temperatures in March and April 2024. Planting of 2024 main *kharif* paddy and maize crops, almost entirely rainfed, for harvest from September onwards, has been completed. According to official estimates, as of 16 August 2024, 36.9 million hectares were planted with paddy and 8.7 million hectares with maize, both well above the five-year average for the same period. Overall, the area planted with these crops is forecast at an above-average level. As of mid-August 2024, remote sensing data indicates favourable vegetation conditions across most cropping areas (ASI map), supported by average to above-average precipitation amounts since late June 2024. In some northern and southern provinces heavy rains triggered flash floods and landslides in late July and August 2024, causing localized crop losses and damage to housing and agricultural infrastructure. The 2024 secondary *rabi* maize crop will be planted from September onwards and the *rabi* paddy crop from November onwards.

According to the latest weather forecasts, there is a high likelihood of above-average precipitation amounts between September and November 2024, likely providing conducive conditions for late plantings and adequate development of the 2024 main crops. However, excessive rains increase the risk of flooding, which can cause significant agricultural damage and population displacement. In addition, above-average temperatures are forecast over the same period, which could foster the development of pest and disease infestations, and reduce yields.

India

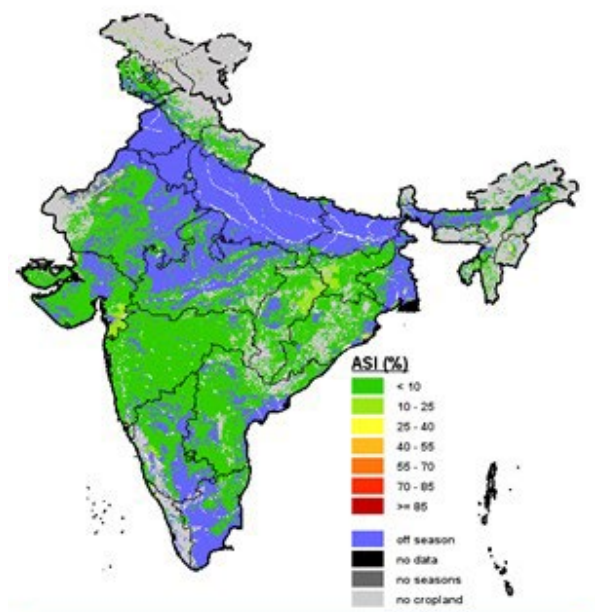
Crop Calendar

(*major foodcrop)



India - Agricultural Stress Index (ASI)

from start of season 1 to dekad 2, August 2024



Total cereal exports forecast at below-average level in 2024/25

On 20 July 2023, the government [banned exports of non-basmati white rice](#), following earlier bans on exports of [broken rice](#) (from 8 September 2022) and [wheat](#) (from 13 May 2022). In August 2023, a 20 percent export duty on parboiled rice was also introduced and basmati rice exports were permitted on the condition that they were priced above a stipulated floor. However, exemptions to these export restrictions have been approved on food security grounds.

Rice exports in calendar 2024 are forecast at 15.4 million tonnes. Wheat exports in the 2024/25 marketing year (April/March) are forecast at 500 000 tonnes, well below the five-year average. Similarly, maize exports in the 2024/25 marketing year (April/March) are forecast at a well below-average level of 800 000 tonnes.

Prices of rice and wheat grain higher year-on-year in July 2024

National average retail prices of rice have generally increased between June 2022 and June 2024, and in July 2024, they were about 10 percent higher than the elevated levels a year earlier. Retail prices of wheat grain have increased steadily from June 2023 and reached record levels in February 2024. Between March and May 2024, prices eased slightly with the arrival of the 2024 harvest into the markets. On 24 June 2024, the government imposed [limits on wheat](#) stocks allowed to be held by retailers, wholesalers, trades and processors effective until 31 March 2025, aiming to prevent hoarding and improve market availability. As of August 2024, wheat stocks in public warehouses, needed to run various welfare schemes, was estimated at 26.8 million tonnes.

India

Cereal Production

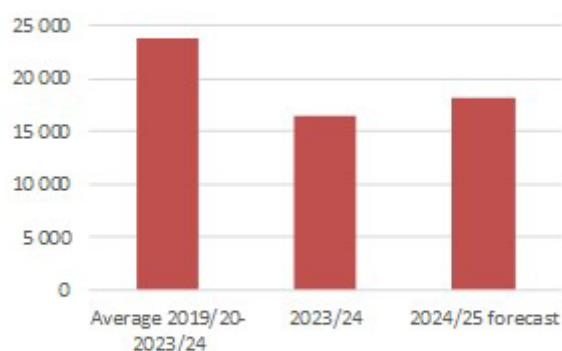
	2019-2023 average	2023	2024 forecast	change 2024/2023
	000 tonnes			percent
Rice (paddy)	193 112	202 900	205 000	1.0
Wheat	107 869	110 554	112 925	2.1
Maize	33 581	35 673	37 000	3.7
Others	18 808	19 055	19 153	0.5
Total	353 370	368 182	374 078	1.6

Note: Percentage change calculated from unrounded data.

India

Cereals Exports

000 tonnes

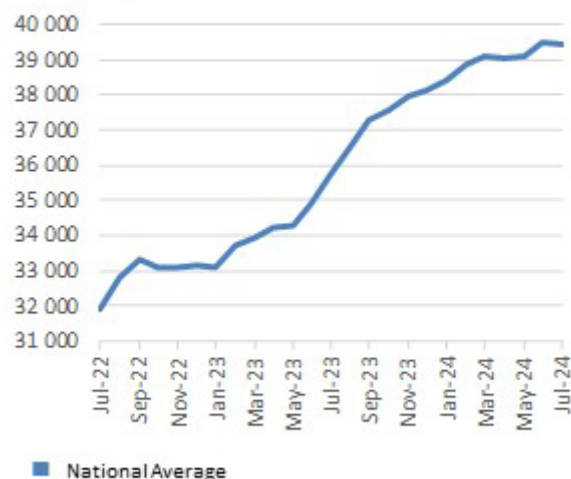


Notes: Includes rice in milled terms. Split years refer to individual crop marketing years (for rice, calendar year of second year shown).

India

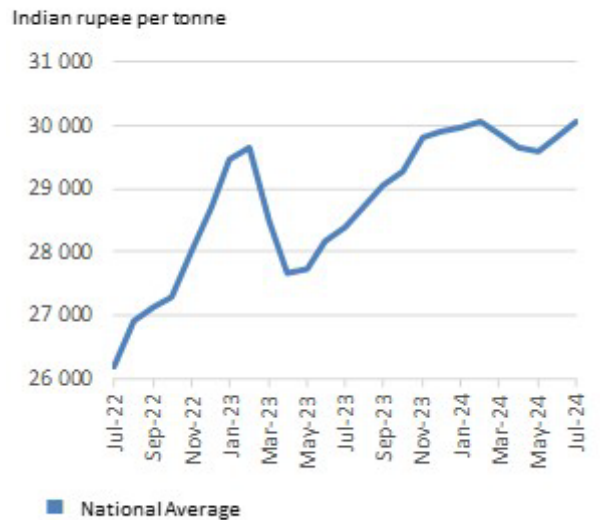
Wholesale prices of rice

Indian rupee per tonne



India

Wholesale prices of wheat



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This brief was prepared using the following data/tools:
FAO/GIEWS Country Cereal Balance Sheet (CCBS) <https://www.fao.org/giews/data-tools/en/>.
FAO/GIEWS Food Price Monitoring and Analysis (FPMA) Tool <https://fpma.fao.org/>.
FAO/GIEWS Earth Observation for Crop Monitoring <https://www.fao.org/giews/earthobservation/>.
Integrated Food Security Phase Classification (IPC) <https://www.ipcinfo.org/>.



GIEWS Country Brief

The Republic of India

Reference Date: 19-October-2023

FOOD SECURITY SNAPSHOT

- Production of 2023 main “Kharif” paddy and maize forecast at above-average levels
- Total cereal exports in 2023/24 marketing year forecast at below-average level
- Prices of rice and wheat higher year-on-year in September

Production of 2023 main “Kharif” paddy and maize forecast at above-average levels

Harvesting of the 2023, mostly rainfed, main “Kharif” paddy and maize crops, accounting for 85 percent of the total production, just began and is expected to finalize in January next year. The area planted with paddy and maize crops is officially estimated at an above-average level. Precipitation amounts during the 2023 June to September monsoon season were generally adequate in most parts of the country, but at below-average level in parts of key cereal producing states of Bihar, Uttar Pradesh and West Bengal in the north, Karnataka in the south and Odisha in the east. Heavy rainfall in July triggered floods and landslides in the northwestern parts of the country, resulting in localized crop losses and disruption of agricultural livelihoods. Overall, the 2023 “Kharif” paddy and maize production is forecast above the five-year average, as area increases are forecast to mostly compensate for yield declines stemming from uncondusive weather in some states.

Wheat crop production, harvested last June, is officially estimated at a record of 112.7 million tonnes, due to both high levels of sowings and yields.

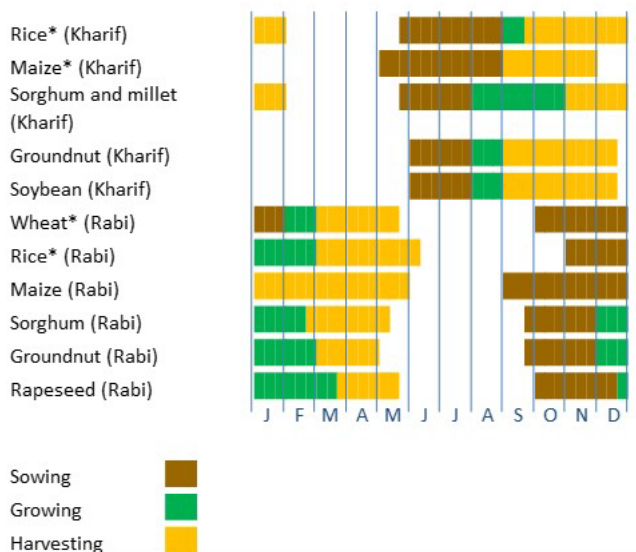
Total cereal exports forecast below average in 2023/24

On 20 July 2023, the government [banned export of non-basmati white rice](#) with immediate effect, following earlier bans on exports of [broken rice](#) (from 8 September 2022) and [wheat](#) (from 13 May 2022). Since then, additional rice export restrictions have been announced, including the 20 percent export duty on parboiled rice variety effective from 25 August 2023. However, the government announced that

India

Crop Calendar

(*major foodcrop)



exceptions to the export restrictions may be approved under a special permission on food security grounds.

Rice exports in calendar 2023 are forecast at 19.3 million tonnes, down 13 percent from the 2022 level. Wheat exports in the 2023/24 marketing year (April/March) are forecast at 1.2 million tonnes, almost half the five-year average level. Maize exports in the 2023/24 marketing year (April/March) are estimated at a well above average level of 3.7 million tonnes, due to strong international demand and adequate availability.

Prices of rice and wheat grain higher year-on-year in September

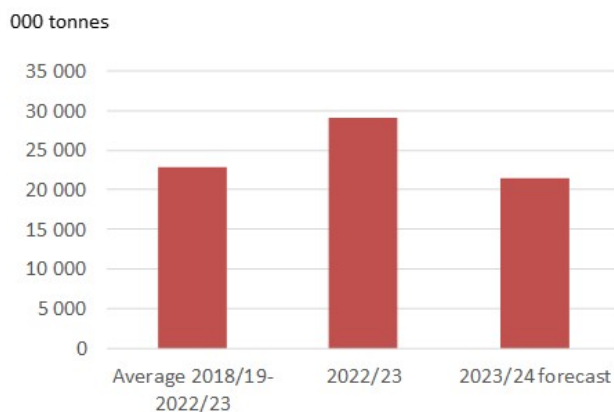
In the New Delhi market, domestic prices of rice have generally increased between September 2022 and March 2023. After some seasonal declines in April and May 2023, prices remained generally stable. As of September 2023, domestic rice prices were 22 percent higher on a yearly basis. Prices of wheat grain softened since February 2023 due to improved market availability from the 2023 harvest. However, in September 2023, prices were 12 percent above their year-earlier levels, after strong increases in 2022, driven by robust international demand and reduced domestic stocks. Prices of various vegetables, including tomatoes and onions, were at higher year-on-year in September 2023 due to tight market availability as crops grown in the main producing northwestern areas were severely affected by heavy rains in July.

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 Integrated Food Security Phase Classification (IPC) <https://www.ipcinfo.org/>

India

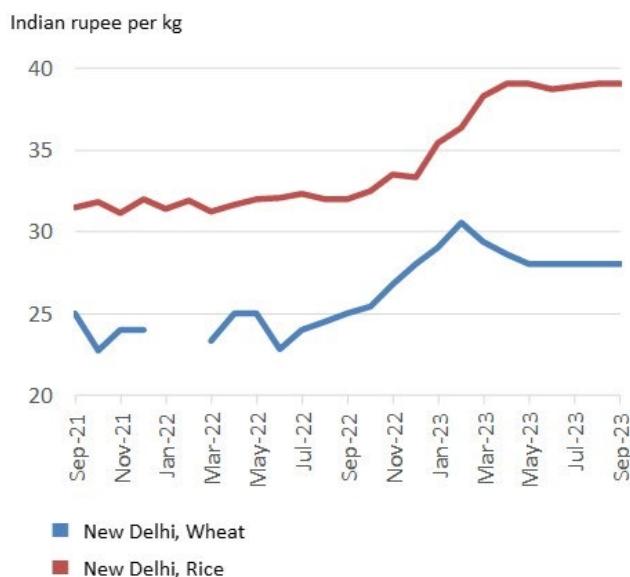
Cereals Exports



Notes: Includes rice in milled terms. Split years refer to individual crop marketing years (for rice, calendar year of second year shown).

India

Retail prices of wheat and rice in India





GIEWS Country Brief India

Reference Date: 27-May-2022

FOOD SECURITY SNAPSHOT

- Earlier expectations for record 2022 wheat output unmet due to heatwave in northwestern parts of the country
- Cereal exports in 2021/22 marketing year estimated at record level
- Prices of rice stable, those of wheat on increase since start of 2022
- Food security overall good

Earlier expectations for record 2022 wheat output unmet due to heatwave in northwestern parts

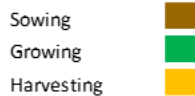
Harvesting of the 2022, mostly irrigated, main “Rabi” wheat crop is expected to finalize at the end of June. The area planted is officially estimated at 34.3 million hectares, close to last year’s high level, supported by the remunerative Minimum Support Price (MSP) by the government and optimal soil moisture conditions at planting time. Weather conditions were favourable between October 2021 and February 2022 over the main wheat producing areas, raising expectations for record yields. Unfortunately, unseasonal high temperatures and a well below-average precipitation from mid-March to April over northwestern parts of the country affected crops just before the harvest. Wheat crops at the grain filling stages of development were the most affected by the high temperatures, given that the crops increased susceptibility to heat at this phenological stage. As a result, yields are now expected to fall below record levels that had been forecast earlier. Wheat cultivation in Punjab, Haryana and Uttar Pradesh states were the most affected. Based on current official estimates, 2022 wheat production is expected at about 106.4 million tonnes, which is above the five-year average. However, it is likely that production may be lower as the extent of the heatwave damage is still to be fully assessed.

Planting of the bulk of the 2022 main “Kharif” is expected to start at the end of May, with the onset of the monsoon season (June-September), while planting of the maize crop started earlier in March. The outcome of the main season will depend on the pattern of the 2022 monsoon season, which according to April forecasts by the India Meteorological Department, is likely to bring normal precipitation amounts over the country.

India

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

India

Cereal Production

	2016-2020	2020	2021	change
	average			2021/2020
	000 tonnes			percent
Rice (paddy)	174 644	186 546	189 351	1.5
Wheat	100 426	107 861	109 587	1.6
Maize	28 557	31 647	33 180	4.8
Others	17 975	19 731	17 590	-10.9
Total	321 602	345 785	349 708	1.1

Note: Percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Cereal exports in 2021/22 estimated at an all-time high

The country is the fifth largest exporter of cereals, mostly exporting rice, wheat and maize, plus small quantities of rye, barley, oats and sorghum. Total cereal exports in the 2021/22 marketing year are forecast at a record level of 31.6 million tonnes, more than doubling the five-year average. This reflects a surge in exports of wheat, estimated at a record level of 8 million tonnes, almost eight times the average of the previous five years, driven by large purchases by Bangladesh, Sri Lanka, Indonesia, Nepal and Yemen.

International wheat prices have been steadily rising starting from mid-2021 and accelerated since last February with supply disruptions from the Black Sea Region, increasing the competitiveness of Indian wheat on international markets. In the previous five years, only minor quantities of wheat have been exported, accounting on average for less than 1 percent of the global trade. The low level of exports, despite being the second largest wheat producer after China (mainland), reflects the large-scale governmental purchases at a Minimum Support Price (MSP). While providing support to farmers, it helped the government to purchase large quantities of wheat needed to run various welfare schemes. In 2022, the strong demand from the international market has caused local market prices to increase to levels above the MSP, prompting farmers to prefer to sell wheat to private traders for exports.

As mid-May 2022, only about 18.1 million tonnes of wheat were procured, 50 percent below last year's level during the same period, and well below the planned procurement target of 44.4 million tonnes. Consequently, on 13 May 2022, the government announced the implementation of restrictions to wheat exports with immediate effect. Shipments will be permitted only when letters of credit have already been issued on or before the date of this notification. In addition, exports will be allowed to neighbouring and vulnerable countries to meet their food security needs (see [link](#) for more information). On 17 May 2022, the government announced additional conditions for export notification under the current wheat export restrictions, namely shipments will also be permitted when consignments have been handed to Customs for examination and have been registered into their system on or before the announcement of the restriction on 13 May 2022 (see [link](#) for more information).

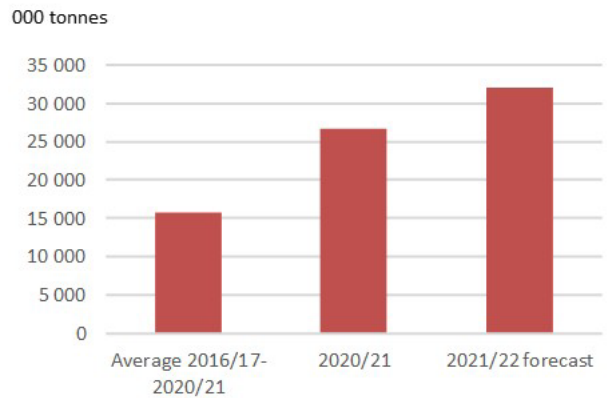
Rice exports account for the bulk of country's cereal exports and in the 2021/22 marketing year (October/September) exports of rice are forecast at 19.7 million tonnes. Maize exports in the 2021/22 marketing year (April/March) are estimated at a well above-average level of 3.7 million tonnes, due to strong international demand and adequate availabilities.

Prices of rice and wheat generally stable and close to year-earlier levels

After being generally stable since the start of 2022, domestic prices of rice softened in April, reflecting improved market supplies from the bumper 2021 harvests. Prices of wheat grain have been generally increasing since the beginning of

India

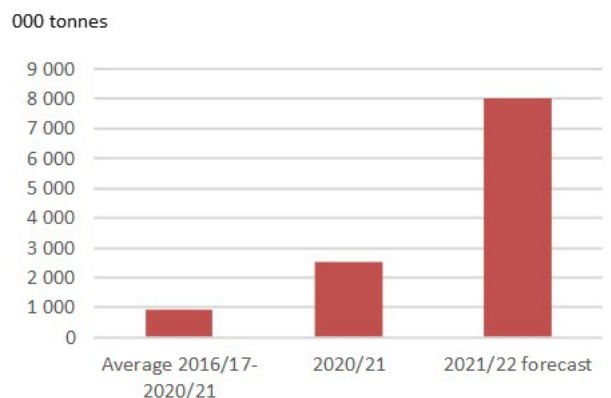
Cereals Exports



NoteS: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

India

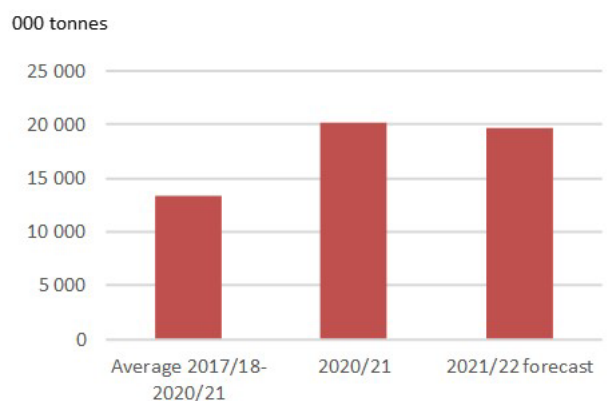
Wheat Exports



Note: Split year refers to crop marketing year.
Source: FAO/GIEWS Country Cereal Balance Sheets.

India

Rice Exports



Note: Rice in milled terms.
Source: FAO/GIEWS Country Cereal Balance Sheets.

the year, reflecting solid export demand and expectations for large government purchases. Concerns over the impact of the heatwave on domestic wheat production added to the upward pressure. Overall, rice prices in April were close to their year-earlier levels, while prices of wheat were 7 percent higher year on year.

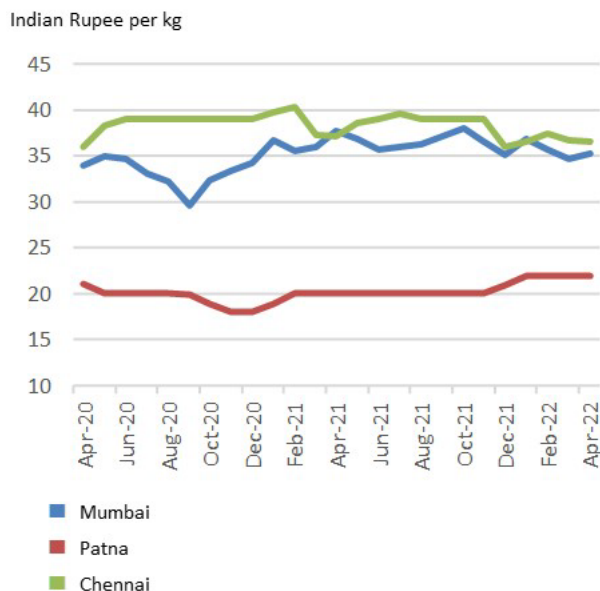
Overall good food security situation

The overall food security situation is generally good, following several consecutive years of bumper harvests and the delivery of subsidized cereals to vulnerable households through the National Food Security Act (NFSA), established in 2013. Since March 2020, as a response to the COVID-19 pandemic, the government intensified the support through the Pradhan Mantri Garib Kalyan Anna Yojana (PM-GKAY) scheme that provides an additional 5 kg of rice or wheat and 1 kg of preferred pulses for free to the 800 million beneficiaries of the NFSA. The PM-GKAY is expected to continue until September 2022. According to an [IMF report](#), released on April 2022, the existing food security welfare scheme has been critical in preventing increases in extreme poverty levels during COVID-19 pandemic.

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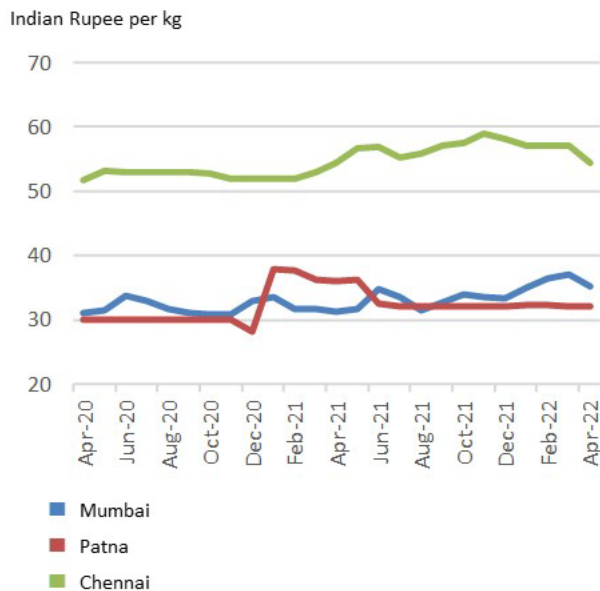
Retail wheat prices in major cities



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

India

Retail rice prices in major cities



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief India

Reference Date: 12-March-2021

FOOD SECURITY SNAPSHOT

- Production of 2021 wheat crop officially forecast at record level, driven by large plantings
- Cereal production in 2020 forecast at record level
- Cereal exports in 2020/21 forecast well above five-year average
- Prices of rice and wheat generally stable and close to year-earlier levels
- Food security overall good, but poverty rate increased due to COVID-19 pandemic

Production of 2021 wheat crop officially forecast at record level

Harvesting of the 2021, mostly irrigated, main “Rabi” wheat crop is about to start and early official forecasts indicate a record production of 109.2 million tonnes. The area planted is officially estimated at an all-time high of 34.6 million hectares. Farmers have been encouraged to increase the planted area by the remunerative producer prices guaranteed by the Government, coupled with optimal soil moisture conditions at planting time and the timely harvest of previously grown summer crops that made land available. Overall, yields are forecast close to average as weather conditions were generally favourable throughout the cropping season and supplies of agricultural inputs, including irrigation water and fertilizer, were adequate.

Cereal production in 2020 forecast at record level

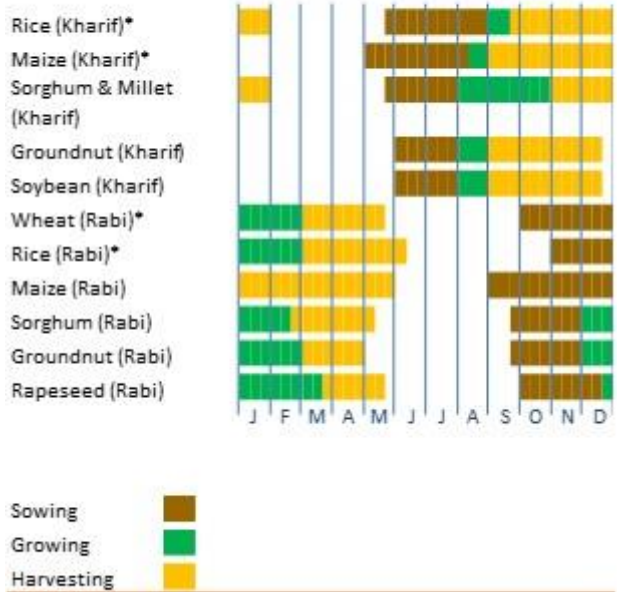
Harvesting of the 2020 main “Kharif” paddy crop was completed in February and the production is estimated at a record level of 159 million tonnes (in paddy terms). The bumper output mostly reflects an increase in plantings driven by official support programmes including the Minimum Support Prices (MSP) and abundant June to September monsoon rains. Harvesting operations of the 2020 secondary “Rabi” paddy has just started and the output is forecast at 25.6 million tonnes (in paddy terms) due to increased plantings and favourable weather conditions and adequate irrigation water supplies. Overall, the 2020 aggregate paddy output is forecast at a record of 184.5 million tonnes.

Harvesting of the 2020 main “Kharif” maize crop was completed last December. The output is officially estimated at a high level, reflecting as record area sown driven by strong

India

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

India

Cereal Production

	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Rice (paddy)	168 655	178 296	184 491	3.5
Wheat	96 160	103 600	107 590	3.9
Maize	26 742	28 770	30 160	4.8
Others	17 220	15 344	18 980	23.7
Total	308 776	326 010	341 221	4.7

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

demand of the feed industry and above-average yields due to favourable weather conditions. Harvesting of the 2020 secondary maize crop has just started and will continue until May and production prospects are generally favourable. The 2020 maize output is officially forecast at a record of 30.2 million tonnes. The 2020 wheat production, harvested in June 2020, is estimated at a high level of 107.6 million tonnes.

Overall, the 2020 aggregate cereal output is forecast at a record level of 341.2 million tonnes (rice in paddy terms).

Cereal exports in 2020/21 forecast well above five-year average

Aggregate cereal exports (mostly rice, wheat and maize) in 2020/21 are forecast at 18.4 million tonnes, 43 percent above the five-year average and the highest level since 2013/14, reflecting ample availabilities and high demand on the international markets. Rice exports in 2021 (calendar year) are forecast at a record of 16.2 million tonnes. Exports of maize and wheat are forecast at 2 and 1 million tonnes, respectively, almost two and three times more than the last five-year averages.

Prices of rice and wheat generally stable and close to year-earlier levels

Domestic prices of rice and wheat have been generally stable since June 2020, reflecting adequate market availabilities from the record harvests. Overall, in February 2021, prices of rice and wheat were close to their year-earlier levels.

Food security situation overall good, but poverty rate increased due to COVID-19 pandemic

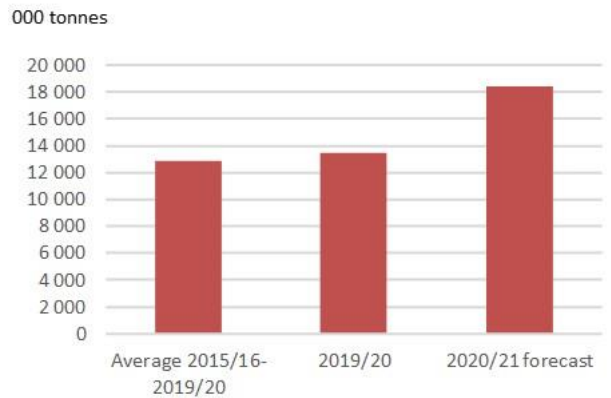
The overall food security situation is generally good, following several consecutive years of bumper harvests and the delivery of subsidized cereals to the vulnerable households under the National Food Security Act (NFSA), established in 2013. In March 2020, as a response to the COVID-19 pandemic, the Government intensified the support through a new food security welfare scheme launched with the aim to provide additional 5 kg of rice or wheat and 1 kg of preferred pulses for free to 800 million beneficiaries of the NFSA. Between March 2020 and February 2021, the total amount of food grains distributed to the most vulnerable groups of people under the Pradhan Mantri Garib Kalyan Anna Yojana (PMGKAY) scheme is estimated at 27.62 million tonnes. Between the same period, the distribution of food grains under the NFSA is estimated at 45.99 million tonnes.

Poverty rates have increased considerably in 2020 following massive unemployment due to the effects of the COVID-19 pandemic on the local economy. According to the United Nations Development Programme (UNDP), the number of poor people increased by 260 million in 2020, almost reverting the gains obtained between 2006 and 2016.

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India

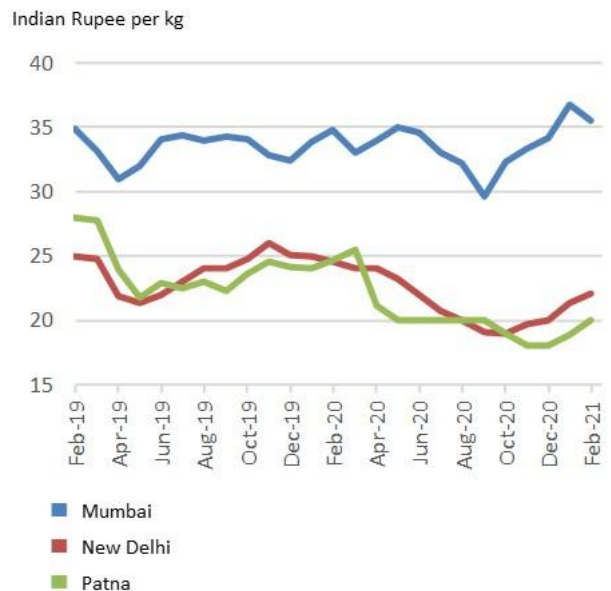
Cereals Exports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

India

Retail wheat prices in major cities



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief India

Reference Date: 07-July-2020

FOOD SECURITY SNAPSHOT

- **Wheat production in 2020 estimated at record level**
- **Cereal production reached record levels in 2019**
- **Rice exports in 2020 forecast to recover**
- **Prices of rice and wheat close to year-earlier levels**

Wheat production in 2020 estimated at record level

Harvesting of the 2020 “Rabi” wheat crop was completed at the end of May and is estimated at a record level of 107.2 million tonnes. The bumper output is largely due to increased plantings, estimated at a record level driven by the remunerative minimum support prices guaranteed by the Government. Weather conditions were generally favourable throughout the cropping season and supplies of agricultural inputs, including irrigation water and fertilizers, were adequate. Overall, yields are forecast above the five-year average, despite localized damages to standing crops in the main producing northern states of Punjab, Haryana, Uttar Pradesh and Rajasthan due to unseasonably heavy rains and hailstorms in March.

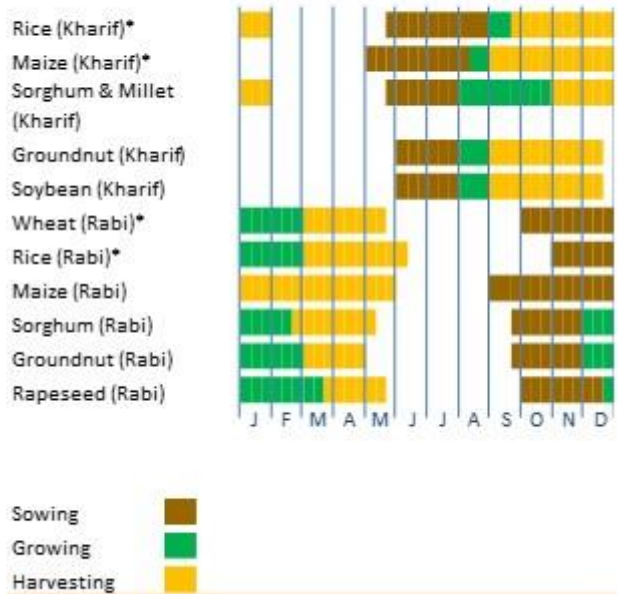
Land preparation and planting of the 2020, mostly rainfed, main “Kharif” paddy crop are underway, supported by favourable weather conditions. According to an official report, as of 12 June 2020, some 6.6 million hectares were planted with rice, 16 percent above the level in the same period of the previous year. Weather forecasts indicate a higher likelihood of average to above-average rainfall during the 2020 monsoon period, which spans from June to September. The area planted is forecast at an above-average level.

Land preparation and plantings of the 2020 main “Kharif” maize crop, for harvest from September onwards, are progressing at a fast pace. According to an official report, as of 12 June 2020, about 3.9 million hectares were planted with maize, 7 percent above the level of the same period in 2019. The planted area is forecast at an above-average level, driven by a sustained demand by the feed industry. Some concerns remain due to the potential impact of Fall Armyworm (FAW) infestations, but precautionary measures undertaken by the Government are expected to reduce crop losses.

India

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

India

Cereal Production

	2014-2018	2018	2019 estimate	change
	average			2019/2018
	000 tonnes			percent
Rice (paddy)	164 638	174 711	176 901	1.3
Wheat	94 610	99 870	103 600	3.7
Maize	25 822	27 720	28 980	4.5
Others	17 909	18 220	15 340	-15.8
Total	302 979	320 521	324 821	1.3

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Cereal production reached record levels in 2019

The 2019 cropping season finalized in May 2020 with the end of “Rabi” harvests. The aggregate cereal output, including wheat, paddy rice and maize, is estimated at a record level of 324.8 million tonnes.

Rice exports in 2020 forecast to increase

The country is the world’s top rice exporter. In the 2020 calendar year, exports of rice are forecast at 10.8 million tonnes, nearly 10 percent above the reduced level in 2019.

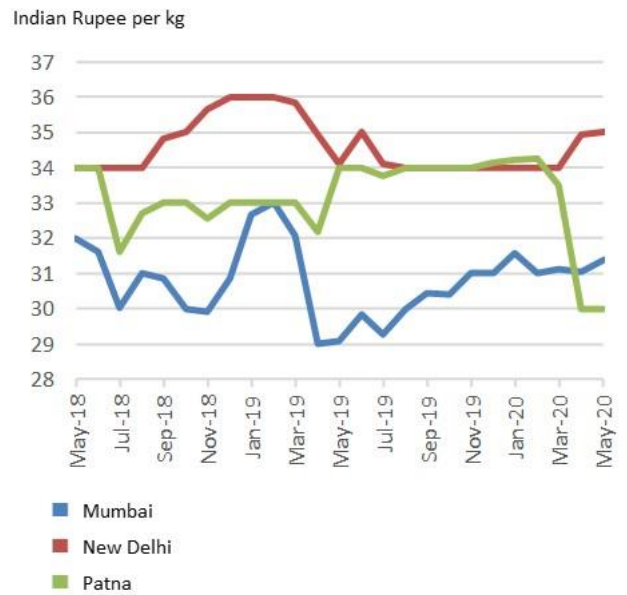
Prices of rice and wheat close to year-earlier levels

After the slight increases in March and April, prices of rice levelled off in May, as the downward pressure from the record 2019/20 secondary harvest was offset by Government purchases. According to official estimates, as of mid-June 2020, the Government procured about 72.7 million tonnes of paddy, accounting for about 40 percent of the total annual output. Overall, prices of rice in May 2020 were close to their levels a year earlier.

Retail prices of wheat were stable since the beginning of the year and declined in May on account of improved market availabilities following the start of the 2020 harvest. Overall, wheat prices in May 2020 were close to their year-earlier levels.

India

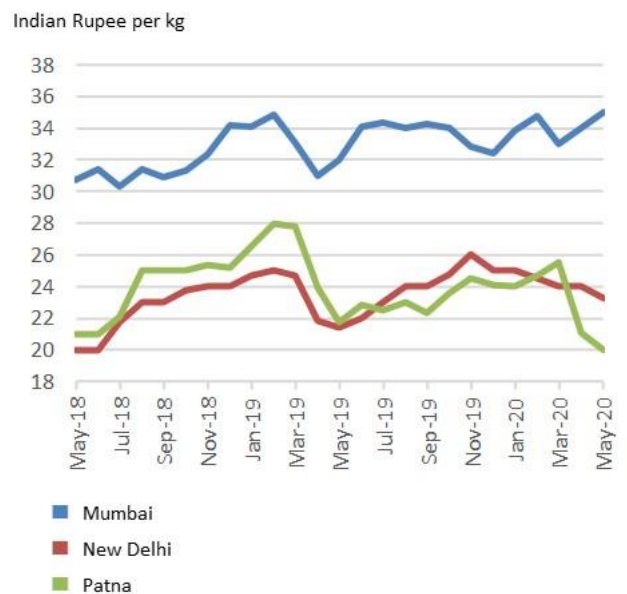
Retail rice prices in major cities



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

India

Retail wheat prices in major cities



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

COVID-19 and measures adopted by the Government

In an attempt to prevent the spread of COVID-19, in early March 2020, the Government adopted several measures, including travel restrictions, closure of educational and public institutions, bans on mass gatherings and encouraging firms to promote remote work. On 30 May 2020, the Government issued the “Unlock 1” guidelines, for a gradual re-opening by phases of most activities across the country.

On 26 March 2020, the Government announced a package of measures to support the livelihoods of the most vulnerable households. The main elements of the package are:

- In-kind (food rations and cooking gas) and cash transfers for the low-income households.
- Wage support to low-wage workers.

In mid-May 2020, the Government announced new measures meant to:

- Support businesses, including micro, small and medium-sized enterprises, and non-bank financial companies in the form of various financial measures, such as liquidity injections and tax deduction for workers.
- Expand the support for the poor households, especially for migrants and farmers. These include concessional credits to farmers and credit facility for street vendors and the expansion of the provision of food for non-ration card holders (mainly migrants).
- Support the agriculture sector-
- Provide work opportunities to low-wage labourers.

On 1 June 2020, the Government approved the increase of the Minimum Support Prices (MSP) for the 2020 “Kharif” crops, currently being planted and to be harvested from September onwards.

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GIEWS Country Brief India

Reference Date: 9-August-2019

FOOD SECURITY SNAPSHOT

- Late and erratic monsoon rains affecting planting of 2019 “Kharif” crops
- Rice exports in 2019 forecast at high level
- Prices of rice and wheat increased generally in past three months, amid large Government procurement
- Food security and livelihoods of millions of people affected by major floods in the north and south

Late and erratic monsoon rains affecting planting of 2019 “Kharif” crops

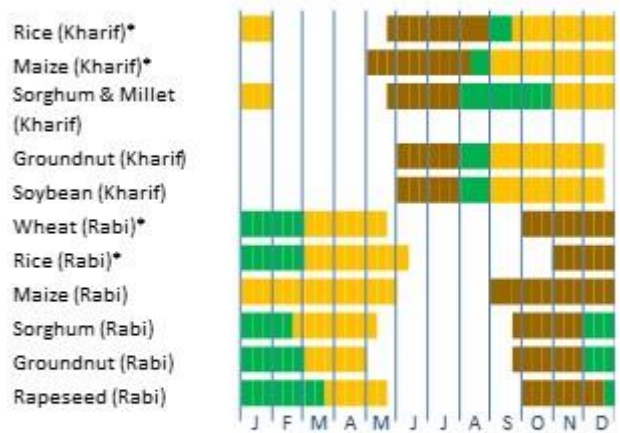
Planting of the 2019, mostly rainfed, “Kharif” paddy crop started in May and is expected to continue until the end of August and to be harvested between September 2019 and January 2020. The 2019 southwest monsoon, spanning normally from June to September, started with a delay of one week and has been characterized by erratic rains. Persistent dry weather conditions have been reported in the states Andhra Pradesh and Tamil Nadu in the southeast, as well as in West Bengal in the north, where cumulative below-average rainfall between May and July has hampered planting activities. Above-average rains in northeastern Bihar and Assam states in July mitigated moisture deficits and allowed plantings to reach the above-average levels in non-flooded areas. These torrential rains also triggered floods and landslides resulting in localized agricultural damages. Overall, in early August, official reports indicate that nationwide 22.4 million hectares have been planted with paddy, about 12 percent below the previous year’s level. If well distributed and adequate rainfall for the remainder of the monsoon season occurs, the final planted area with “Kharif” paddy in 2019 is anticipated to catch up with the average level attained in 2018. Farmers had initially targeted a high level of plantings, amid remunerative farm gate prices, and the recently announced increase of the Minimum Support Prices for the 2019/20 “Kharif” procurement season (see [FPMA Food Policies](#)) is likely to add support to their sowing plans.

Planting of the 2019 main “Kharif” maize crop is underway and is expected to be completed by August. As of early August, the planted area amounted to 6.9 million hectares, close to the average. Outbreaks of Fall Armyworm (FAW), which were first detected in the country in 2018, have been reported in few states during the current 2019 “Kharif” season, mainly in northeastern Mizoram, Manipur and Nagaland states, and northern West Bengal and Chhattisgarh states, which are minor maize producing

India

Crop Calendar

(*major foodcrop)



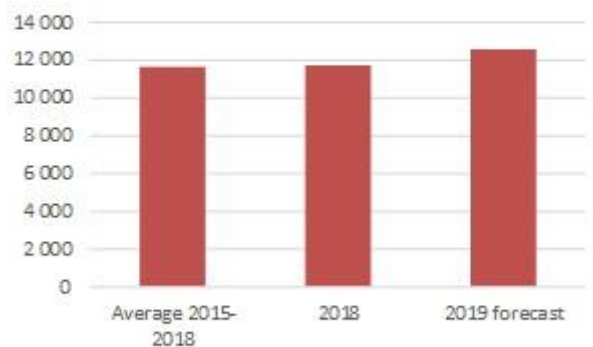
Sowing
Growing
Harvesting

Source: FAO/GIEWS.

India

Rice Exports

000 tonnes



Note: Rice in milled terms.

Source: FAO/GIEWS Country Cereal Balance Sheets.

areas. The impact over the maize output is estimated to be marginal, as the agricultural authorities have implemented nationwide precautionary measures.

Harvesting of the 2019 “Rabi” wheat crop was completed in June and production is officially estimated at record 101.2 million tonnes, 7 percent above the five-year average. The production increase reflects record yields, due to favourable weather conditions, that more than compensate a slightly below-average planted area.

Rice exports in 2019 forecast at high level

The country remains the world’s largest rice exporter. Rice exports in the 2019 calendar year are forecast at high 12.1 million tonnes, 6 percent above the five-year average and the second highest level on record, reflecting bumper availabilities from the 2018 harvest.

Prices of rice and wheat increased recently, amid large Government procurement

Retail prices of rice were overall stable between January and April 2019. Subsequently, they increased or remained stable between May and June due to large Government procurement that more than offset the downward pressure from the arrival into the market of the supplies from the “Rabi” crop harvest. According to official estimates, as end of July, the Government had procured about 65.5 million tonnes of paddy, accounting for about 36 percent of the total annual output. In July, prices decreased slightly or remained stable reflecting adequate market availabilities.

Retail prices of wheat increased between the second half of 2018 and February 2019, due to seasonal upward pressure, and declined between March and May with the commercialization of the 2019 record wheat “Rabi” crop output. In June and July 2019, prices edged up, reflecting large Government purchases. As of early July, the concluded 2018/19 “Rabi” wheat procurement was officially estimated at 34.1 million tonnes, about a third of the annual wheat production.

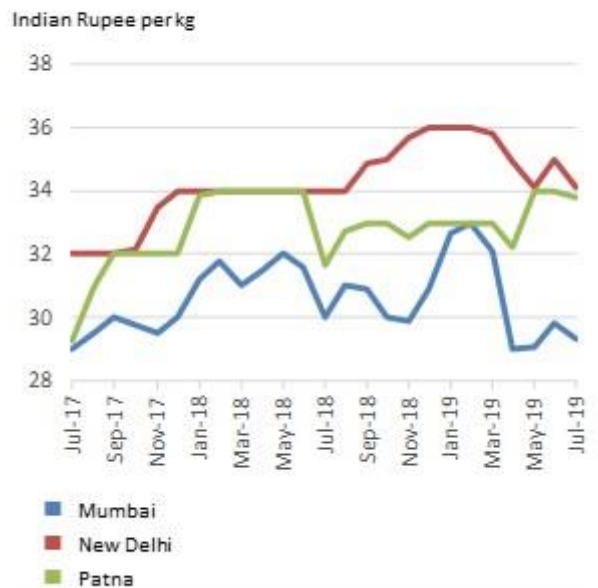
Food security and livelihoods of millions of people affected by major floods in the north and south

Torrential rains during the first two dekads of July triggered severe floods mainly in Assam and Bihar states in the north and in the Kerala State in the south. According to UN-OCHA, as of 25 July, 20.8 million people were severely affected and about 428 000 people were displaced. Large scale damages to houses, infrastructure and cropped land were reported. In the third dekad of July, the flood levels in the Assam and Bihar states decreased as rains eased, but concerns remain about the restoration of livelihoods and food security conditions of the most vulnerable households. In the southern Kerala State, where the results of impact assessments are not yet available, the flood situation is deteriorating as above-average rainfall persist especially in northern districts.

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India

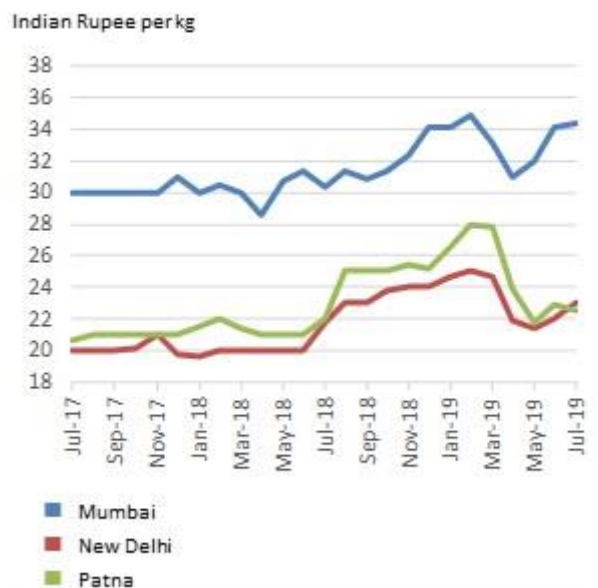
Retail rice prices in major cities



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

India

Retail wheat prices in major cities



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

authorities, or concerning the delimitation of its frontiers or boundaries. The dashed lines represent approximate border lines for which there may not yet be full agreement. The dotted line represents approximately the Line of Control in Jammu and Kashmir agreed upon by India and Pakistan. The final status of Jammu and Kashmir has not been agreed upon by the parties.



GIEWS Country Brief India

Reference Date: 17-December-2018

FOOD SECURITY SNAPSHOT

- Planting of 2019 wheat *Rabi* crop supported by favourable supply of water for irrigation
- Aggregate paddy output in 2018 forecast at record levels
- Total cereal exports in 2018/19 forecast below average
- Prices of rice stable, while those of wheat increased slightly in November
- Overall food security stable but concerns remain for flood-affected populations

Planting of 2019 wheat *Rabi* crop supported by favourable supply of water for irrigation

Planting of the 2019 wheat *Rabi* crop started two weeks behind schedule, in mid-October, due to the late withdrawal of the 2018 Southwest monsoon and it is expected to finalize by the end of the year. The Minister of Agriculture reported that plantings are progressing at an average pace and, as of 30 November, about 15.3 million hectares have been planted with wheat. Overall, plantings are expected to expand from last year's average level due to ample irrigation water availabilities and the Government's intention to raise the Minimum Support Prices (MSP) for *Rabi* crops.

Similarly, planting of the 2018 secondary *Rabi* paddy crop started late, in mid-October, and is expected to finalize by end of January. Total sown area is projected to mark an annual increase due to good availability of water for irrigation in main reservoirs.

Aggregate paddy output in 2018 forecast at record levels

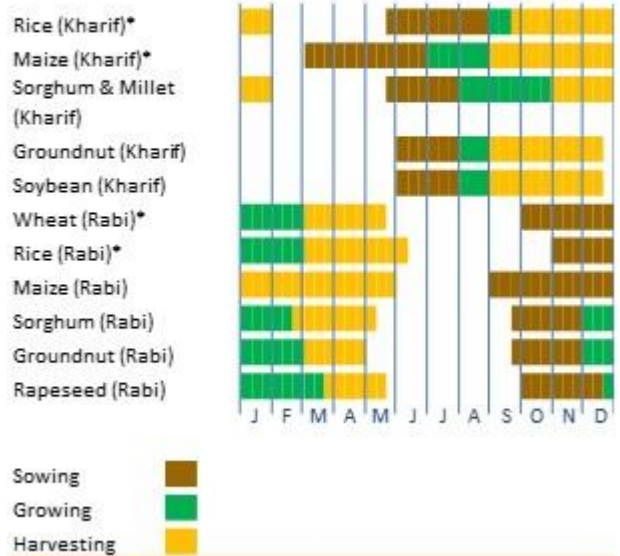
Harvesting of the 2018 paddy *Kharif* crop, to be finalized in January 2019, started with some delay in mid-October due to the late withdrawal of the 2018 Southwest monsoon. According to the India Meteorological Department (IMD), Southwest monsoon rains were spatially and temporally well distributed from June to September in northwest, central and most southern states, while they were erratic in some northeastern states as well as in northern Karnataka, Telangana and southwest Andhra Pradesh, registering some dry spells in July and August.

The 2018 aggregate paddy output, including the 2018 *Kharif* crop and the 2018/19 *Rabi* crop, to be harvested by June 2019, is forecast at a record of 173 million tonnes, 7 percent above the

India

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

India

Cereal Production

	2013-2017 average	2017	2018 forecast	change 2018/2017
	000 tonnes			percent
Rice (paddy)	161 734	169 357	173 000	2.2
Wheat	93 338	98 510	99 700	1.2
Maize	25 124	28 720	28 500	-0.8
Others	17 853	17 880	18 270	2.2
Total	298 049	314 467	319 470	1.6

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

five-year average reflecting expanded *Kharif* and *Rabi* plantings and favourable weather conditions in main producing areas throughout the *Kharif* season.

The 2018 maize aggregate output is forecast at 28.5 million tonnes, 13 percent above the five-year average and similar to last year's high level. The positive performance is due to an expansion in *Kharif* plantings that more than offset lower season's yields owing to dry spells during the critical crop development stages in July and August in Karnataka, Telangana and Southwest Andhra Pradesh.

The 2018 wheat crop, harvested by May 2018, is estimated at a record of 99.7 million tonnes, 7 percent above the five-year average due to higher yields supported by ample availabilities of irrigation water in reservoir storage.

Aggregate 2018 cereal production is forecast at a record level of 319.5 million tonnes, 7 percent above the five-year average.

Total cereal exports in 2018/19 forecast below average

Aggregate cereal exports in the 2018/19 marketing year (April/March) are forecast at 14.2 million tonnes, close to last year's below average level.

Rice exports in the 2018 calendar year are forecast at 12.2 million tonnes, 9 percent above the five-year average and close to last year's record level, reflecting bumper availabilities and steady demand from the country's main buyers.

Prices of rice were stable, while those of wheat increased slightly in November

Retail prices of rice have been generally stable since March 2018 in most markets, as the downward pressure due to ample supplies from the 2018 crops was offset by large Government purchases. By contrast, prices of wheat increased slightly due to the large Government procurement and the announcement, in early October, of an increase of 6 percent in the Minimum Support Prices for the 2019 winter *Rabi* crop.

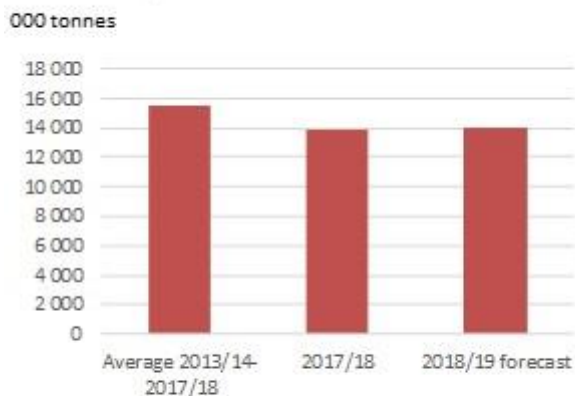
Overall food security stable but concerns remain for flood-affected populations

The overall food security situation in the country is stable due to ample food stocks and the distribution of subsidized cereals to households falling below the poverty line through Government programmes, mainly the National Food Security Act (NFSA), deployed since 2013. The NFSA reaches out to about 75 percent of the rural population and 50 percent of the urban population in the country. In addition, it delivers assistance to pregnant women and children up to 14 years old.

However, some concerns remain on the complete restoration of the food security conditions of populations in the southern State of Kerala that were affected by severe floods last August.

India

Cereals Exports

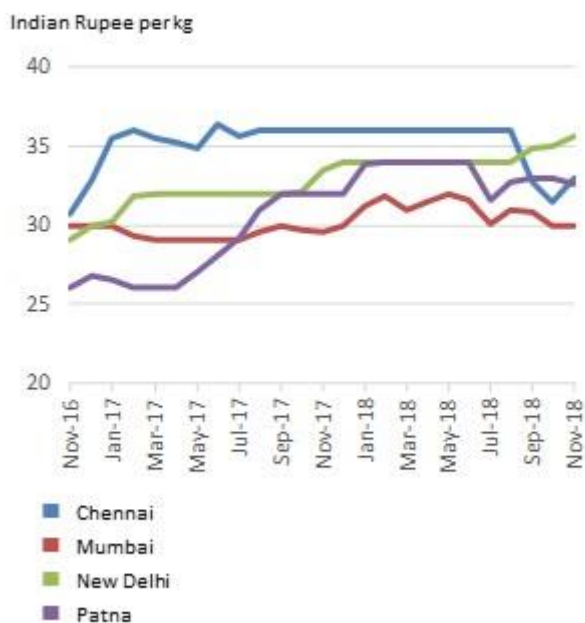


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

India

Retail rice prices in major cities



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

India

Retail wheat prices in major cities

Indian Rupee per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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GIEWS Country Brief India

Reference Date: 09-July-2018

FOOD SECURITY SNAPSHOT

- **Wheat production in 2018 is officially estimated at record level, following previous year's above-average output**
- **Total cereal exports in 2018/19 marketing year forecast at below-average level**
- **Prices of rice and wheat generally stable**
- **Food security conditions mostly satisfactory, but concerns increase for flood-affected populations in northern and southern states**

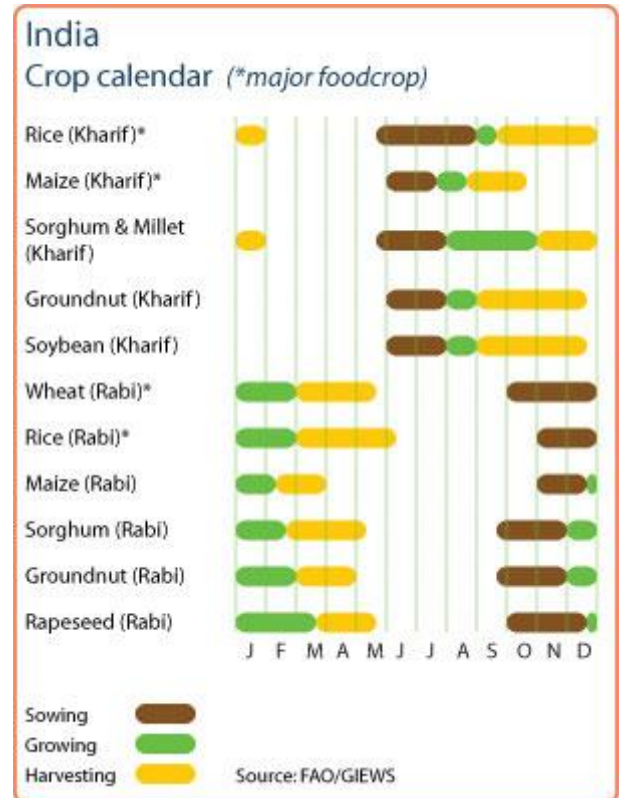
Wheat production in 2018 officially estimated at record high

Harvesting of the 2018, mostly irrigated, *rabi* (winter) wheat crop was completed in May. The latest official estimates put this year's output at a record high of 98.6 million tonnes, close to the previous year's bumper level. Favourable weather conditions and adequate water supplies for irrigated land led to record yields that more than compensated for a 4 percent contraction in the total area planted.

Sowing of the 2018 main *kharif* crops, including rice and maize, started in early June under generally favourable weather conditions and, according to official estimates, plantings have progressed at an above-average rate so far. The area sown to rice is expected to expand this year, as farmers are anticipated to continue favouring rice over other crops, in part due to large domestic procurement operations conducted at minimum support prices. Similarly, the area planted to maize is expected to expand reflecting strong demand from the domestic feed industry. However, the performance of the monsoon rains, which started in June and normally last until September, will be critical in determining the main season's output, while it will also impact the availability of water for the secondary *rabi* crop, to be planted in the last quarter of the year.

Cereal production in 2017 estimated at above-average level

The 2017 cropping season is now closed and the latest official estimate indicates a year-on-year increase in 2017, putting the aggregate cereal production at an above-average level of 310.5 million tonnes. This year's increase is a result of an expansion in plantings, driven by State incentives provided in the



India Cereal production

	2013-2017 average	2017	2018 forecast	change 2018/2017
	000 tonnes			percent
Rice (paddy)	161 317	167 272	170 286	2
Wheat	93 338	98 510	98 610	0
Maize	24 756	26 880	26 800	0
Others	17 853	17 880	18 000	1
Total	297 264	310 542	313 696	1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

form of large State purchases at minimum support prices, and bumper yields owing to favourable weather conditions.

Total cereal exports in 2018/19 forecast at below-average levels

Rice exports in the 2018 calendar year are forecast at 12 million tonnes, slightly below the previous year's high level, but still the second highest on record, reflecting prospects of strong demand from key importers in Africa and the Near East.

Aggregated cereal exports in the 2018/19 marketing year (April/March) are forecast at 13.6 million tonnes, slightly above the previous year's level but down compared to the five-year average.

Rice and wheat prices stable in most markets

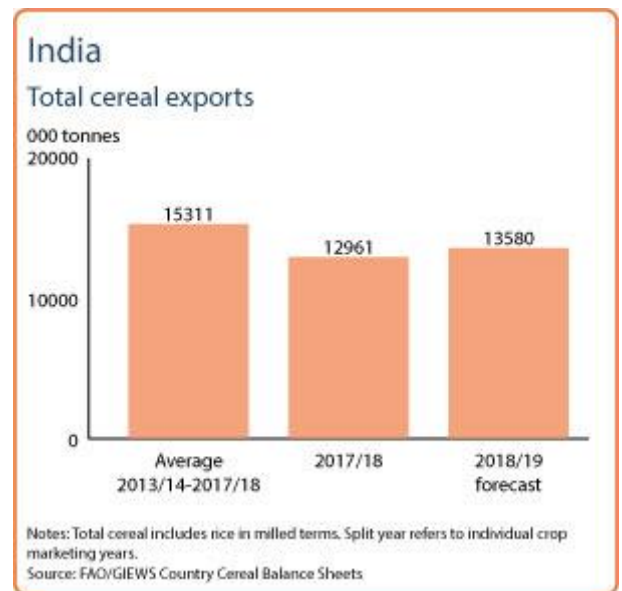
Retail prices of rice and wheat have been stable since March in most markets, as downward pressure from the arrival of the recently harvested crops has been offset by the large Government procurement purchases.

Overall food security satisfactory, but impact of floods heighten concerns for affected populations in northern and southern states

The overall food security situation in the country is satisfactory given the provision of highly subsidized rice as well as the distribution of wheat and coarse grains by the Government.

The country is prone to floods during the monsoon season (June-September), which normally affect a large number of people. This year, heavy rains in June triggered floods and landslides in the northern states of Assam, Tripura and Manipur, and the southern State of Kerala. According to the Assam State Disaster Management Authority (ASDMA), as of 23 June, more than 222 000 people have been severely affected by the floods. Assessments are ongoing, which are expected to provide more detailed information on the extent of the flood damage.

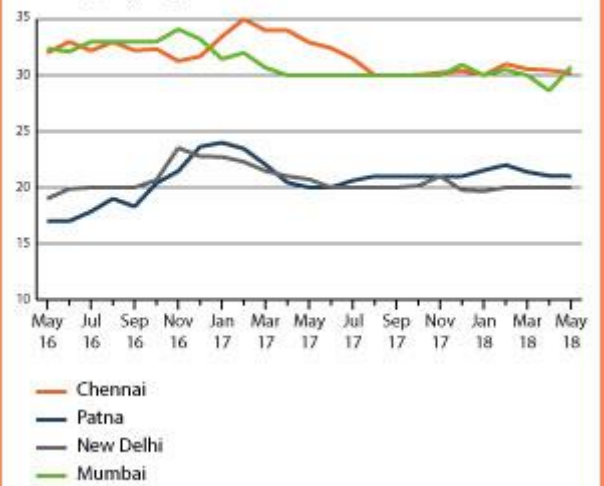
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India

Retail wheat prices in major cities

Indian Rupee per Kg



Source: Ministry of Consumer Affairs



GIEWS Country Brief India

Reference Date: 25-August-2017

FOOD SECURITY SNAPSHOT

- Prospects for 2017 main season crops are favourable, despite floods in northern areas
- Rice prices stable, while those of wheat decrease
- Overall food security satisfactory, but impact of floods heighten concerns for affected households

Prospects for 2017 main season crops favourable, despite floods

Planting of the 2017 main kharif season crops, mostly rice, maize, millet and sorghum, started in June, with the onset of the monsoon rains, and will continue until September. The monsoon rains this year continue to be unevenly distributed so far, resulting in floods in many parts of Gujarat, Bihar, West Bengal, Assam and eastern Uttar Pradesh, while some pockets of south, central and northern regions experienced below-average rains. According to India Meteorological Department (IMD), the cumulative rainfall received until 23 August across the country has been 94 percent of the Long Period Average (LPA), falling below-normal levels. Official estimates, as of 11 August, indicate that 49.78 million hectares had been put under the 2017 main season cereals, up 3 percent compared to the same period in 2016.

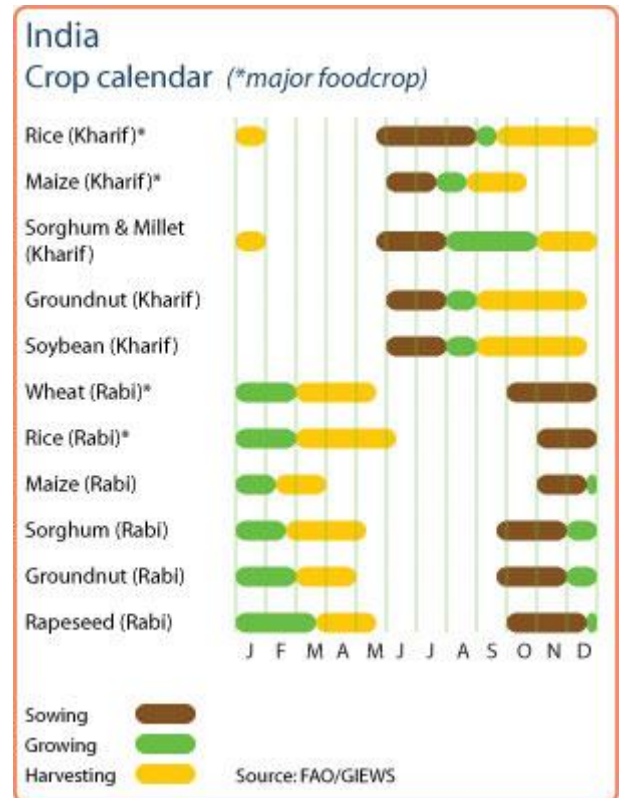
Rice prices stable, while those of wheat decrease

Retail prices of rice were mostly stable, due to adequate domestic availabilities. Prices of wheat and wheat flour decreased in most markets reflecting the record 2017 output and high level of imports in recent months.

Overall food security satisfactory, but impact of floods heighten concerns for affected population

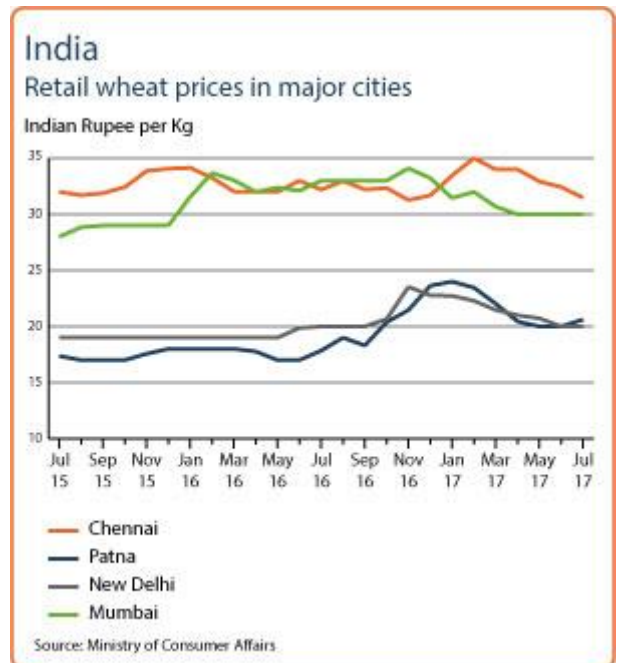
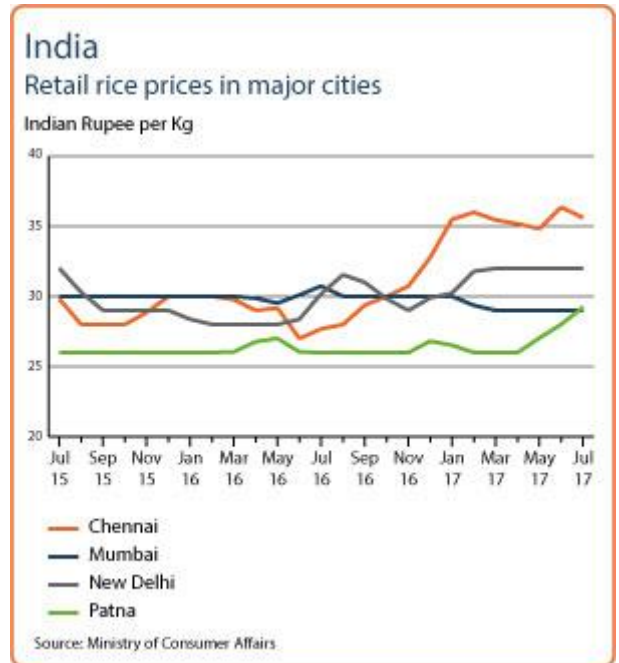
The overall food security situation in the country is satisfactory given the provision of highly subsidized rice, as well as wheat and coarse grains distributed by the Government.

The country is prone to floods during the monsoon season, which normally affect large numbers of people. According to OCHA, as of 24 August, floods and landslides in 2017 affected at least 32.1 million people, mostly concentrated in the northeastern and



northwestern states, and caused a larger number of casualties. Severe damage to housing and infrastructure, including roads and bridges, was also reported. In addition, losses of stored food and livestock are likely to be high in the most affected areas, and coupled with disruptions to internal trade, availability and access of food is expected to be constrained.

The Government is providing relief assistance to the flood-affected population.



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GIEWS Country Brief India

Reference Date: 05-June-2016

FOOD SECURITY SNAPSHOT

- Wheat production in 2017 estimated at record level
- Aggregate cereal production rebounded in 2016
- Total cereal exports in 2017/18 forecast close to last year's reduced level
- Rice prices stable, while those of wheat on decrease

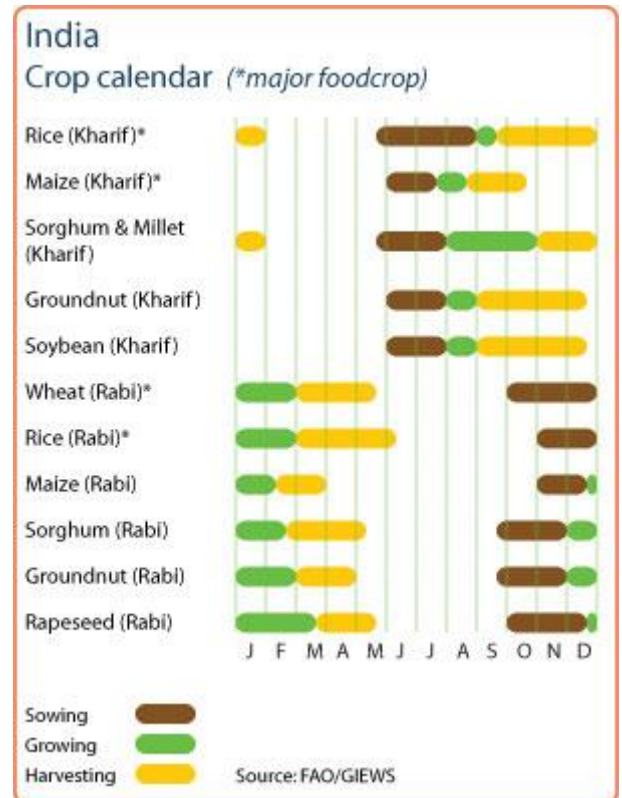
Wheat production in 2017 estimated at record level

Harvesting of the 2017, mostly irrigated, *rabi* (winter) wheat is nearing completion, with the bulk already harvested. Latest official estimates put this year's output at a record high of 97.4 million tonnes, 6 percent above last year's good level. The expected increase is due mostly on a 7 percent year-on-year expansion of the area to 31.8 million hectares, encouraged by State incentives provided in the form of large State purchases at high Minimum Support Prices (MSPs) ([FPMA Food Policies](#)), strong domestic prices and adequate irrigation water supplies.

Planting of the 2017/18 main *kharif* season crops, including rice and maize, has just started. FAO tentatively forecasts the 2017 rice production at 165.5 million tonnes (110.2 million tonnes, milled basis), slightly above the 2016 record crop. However, the current forecast is highly tentative, as the performance of the monsoon rains from June to September will be critical in determining the main season's output and will influence water availability for the secondary *rabi* season crop, planted in the last quarter of the year. The Government support to the rice sector, such as large domestic procurement operations at minimum support prices, is encouraging farmers to continue favouring rice cultivation over other crops in 2017. The 2017 maize output is anticipated by FAO at 26 million tonnes, close to the 2016 record output, under the assumption that strong domestic demand keeps plantings at last year's high level.

Cereal production rebounded in 2016

The 2016 season is closed now and the latest official estimates indicate a rebound in the aggregate cereal output, reflecting an overall recovery in plantings and yields mostly sustained by favourable weather conditions. The 2016/17 rice crop is set at 163.7 million tonnes (109.2 million tonnes, milled basis), implying a 5 percent rebound from the 2015 dry weather-affected output. The 2016 maize output is officially estimated at 26.1 million



India
Cereal production

	2012-2016	2016	2017	change
	average		forecast	2017/2016
	000 tonnes			percent
Rice (paddy)	159,268	163,717	165,520	1
Wheat	92,612	92,290	97,440	6
Maize	23,880	26,140	26,000	-1
Others	17,910	17,910	18,290	2
Total	293,670	300,057	307,250	2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

tonnes, a 16 percent increase from last year's reduced level. The 2016 wheat production, harvested earlier in 2016, is put at 92.3 million tonnes, an increase of 7 percent year-on-year.

Total cereal exports in 2017/18 forecast close to last year's reduced level

Cereal exports in the 2017/18 marketing year (April/March) are forecast to remain close to the 2016/17 low level at 12.2 million tonnes, almost 30 percent below the five-year average. This mainly mirrors tighter exportable availabilities, following the sharply-reduced output in 2015. Wheat exports in 2017/18 are projected at 500 000 tonnes, close to the 2016 reduced level and significantly below the previous three-year average of 3.6 million tonnes. By contrast, maize exports in the 2017/18 marketing year (September/August) are anticipated to increase by 34 percent year-on-year to 850 000 tonnes, but they still remain well below the average as a result of low carryovers and increased domestic demand from the feed and starch industry. Rice exports in calendar year 2017 are forecast at 10.8 million tonnes, 8 percent above the 2016 high level, reflecting prospects of increased demand from key African and South Asian destinations.

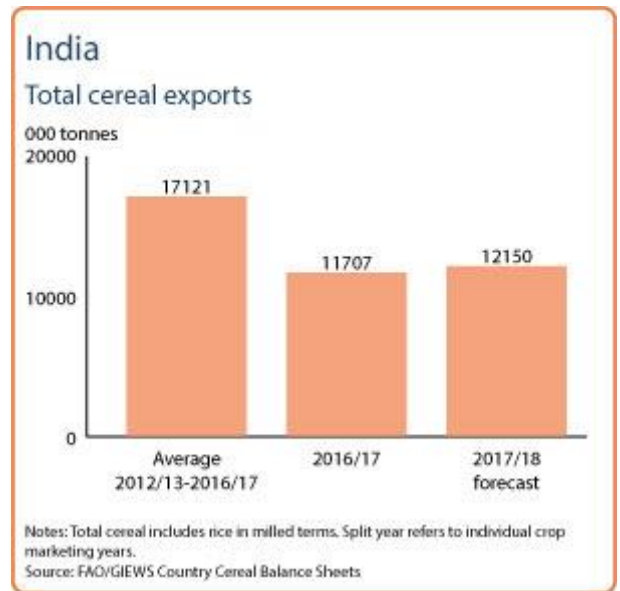
FAO forecasts wheat imports in the 2017/18 marketing year (April/March) at 2.5 million tonnes, half the high level of 2016/17, in line with expectations of sufficient local availabilities from a large 2017 crop.

Rice prices stable, while those of wheat on decrease

Retail prices of rice were mostly stable in recent months, ahead of the 2017 *rabi* season harvest. Prices of wheat and wheat flour decreased in most markets, reflecting improved market availabilities, following the 2017 bumper harvest and large levels of imports in recent months.

Overall food security is satisfactory

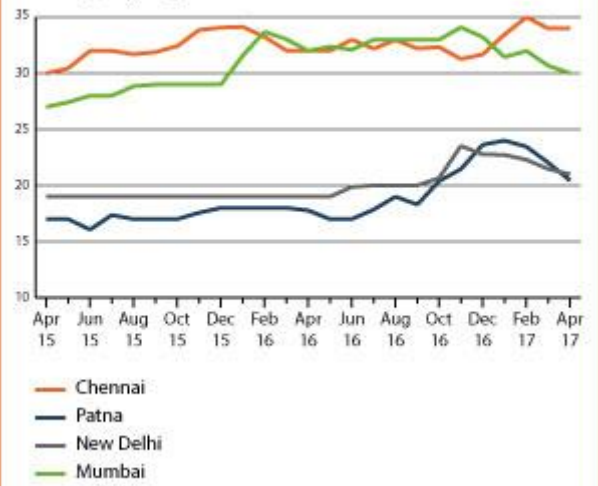
The overall food security situation in the country is satisfactory given the provision of highly subsidized rice as well as wheat and coarse grains through distribution programmes, especially for the below poverty-line families through the National Food Security Act (NFSA). The NFSA was first approved in September 2013 and since then has gradually been rolled out throughout the country, covering all states and territories by November 2016 ([FPMA Food Policies](#)). The country is prone to floods during the monsoon season, which normally affect large numbers of people. In 2016, floods and landslides in July and August, mostly concentrated in the northeastern areas, affected about 6 million people causing losses of human lives, livestock and flood supplies.



India

Retail wheat prices in major cities

Indian Rupee per Kg



Source: Ministry of Consumer Affairs



GIEWS Country Brief India

Reference Date: 19-December-2016

FOOD SECURITY SNAPSHOT

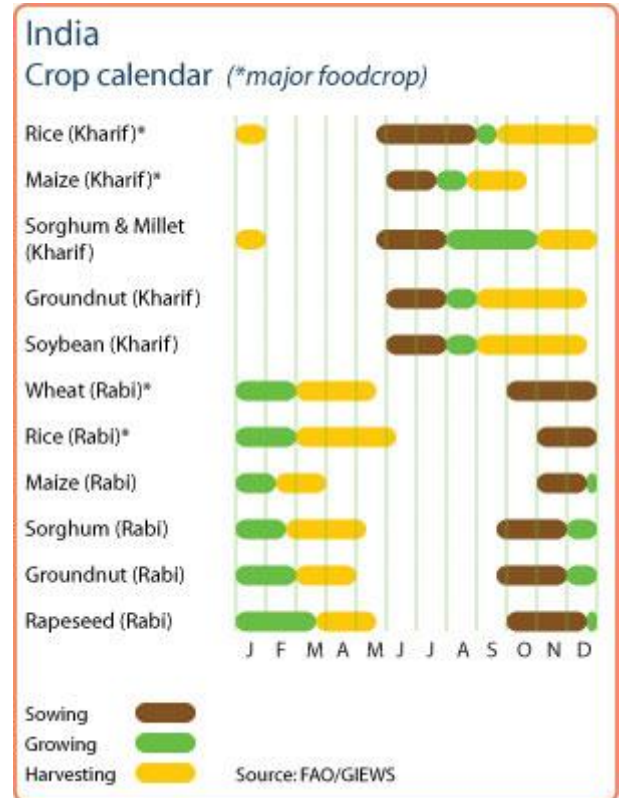
- Early prospects for 2017 wheat crop favourable
- Cereal production to rebound in 2016
- Total cereal exports in 2016/17 forecast close to last year's reduced level
- Rice prices stable or decreased, while those of wheat strengthened in November

Early prospects for 2017 wheat crop favourable

Planting of the 2017, mostly irrigated, *Rabi* (winter) wheat is well advanced. Generally normal monsoon rains benefited soil moisture levels, facilitating planting activities. However, the demonetization of certain bank notes, announced in early November, reduced farmers' ability to timely access basic agricultural inputs and caused some planting delays. In response, the Government took special measures to support farmers in the ongoing *Rabi* season, such as the disbursement INR 210 billion (USD 3.07 billion) in farm credit and extended the time limits for the payment of crop insurance premiums. In addition, in mid-November, the Government increased the Minimum Support Prices for 2017 wheat by 6.6 percent from the previous season ([FPMA Food Policies](#)). Official estimates, as of 9 December, indicate that 22.6 million hectares were sown with wheat crop, 12 percent above the area planted at the same time in 2016. Early official forecasts put the 2017 wheat production at 93.9 million tonnes, slightly above the 2016 good level. This forecast assumes that favourable growing conditions continue during the remainder of the season.

Cereal production to rebound in 2016

Harvesting of the 2016 main *Kharif* paddy crop, accounting for over 80 percent of the annual production, is well advanced. The latest official estimate puts the 2016 *Kharif* rice production at 93.9 million tonnes (milled basis), 3 percent above the reduced level of 2015 and a record high. The increase mainly reflects an expansion of plantings, sustained by State incentives provided in the form of large public sector purchases at a higher Minimum Support Price (MSP) and a favourable performance of the monsoon rains. Prospects also remain favourable for the secondary *Rabi* crop, currently planted and for harvest from March 2017, due to the strong State support to expand plantings and improved water availability for irrigation. Reflecting expectations of gains in the main and secondary season crops, FAO forecasts the 2016 aggregate paddy production at



India Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Rice (paddy)	158 089	156 472	161 500	3
Wheat	91 528	86 530	93 500	8
Maize	22 852	21 810	25 855	19
Others	18 410	16 240	17 650	9
Total	290 879	281 052	298 505	6

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

161.5 million tonnes (107.7 million tonnes, milled basis), implying a 3 percent recovery from last year's dry weather-affected output.

The 2016 maize output is officially forecast to recover from last year's reduced level by almost 20 percent to 25.9 million tonnes, mainly reflecting a large expansion in plantings and higher yields due to favourable weather conditions.

The latest official estimate puts the 2016 wheat production, harvested earlier in 2016, at 93.5 million tonnes, up 8 percent from the 2015 reduced output.

Total cereal exports in 2016/17 forecast close to last year's reduced level

Cereal exports in the 2016/17 marketing year (April/March) are forecast to remain close to the 2015/16 low level at 12.3 million tonnes, around 30 percent below the five-year average. This mainly reflects tighter exportable availabilities, owing to the sharply-reduced output in 2015. Wheat exports in 2016/17 are forecast at 700 000 tonnes, almost a 35 percent drop from the 2015 sharply-reduced level and significantly below the previous three-year average of 5.4 million tonnes. Although maize exports in the 2016/17 marketing year (September/August) are forecast to double last year's low level to 1.4 million tonnes, this is still well below the average reflecting low carryovers and increased domestic demand from the feed and starch industry. Rice exports in calendar year 2016 are forecast at 10.1 million tonnes, 10 percent below the 2015 high level due to a combination of subdued demand and tighter exportable availabilities.

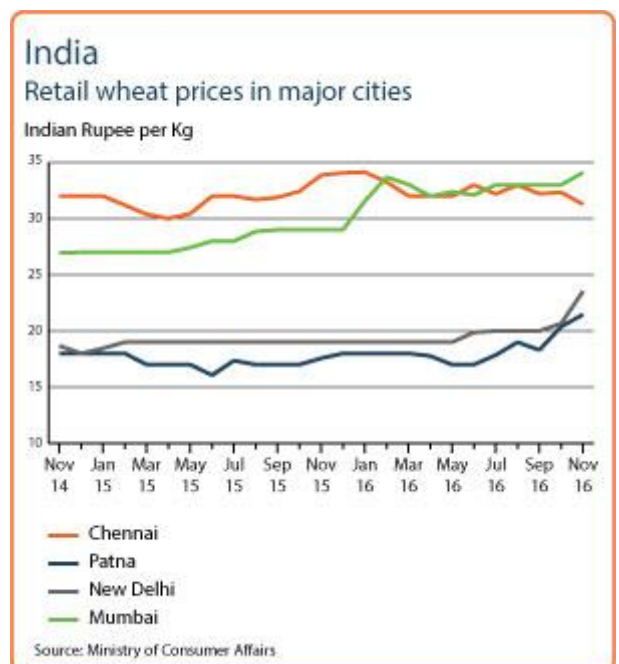
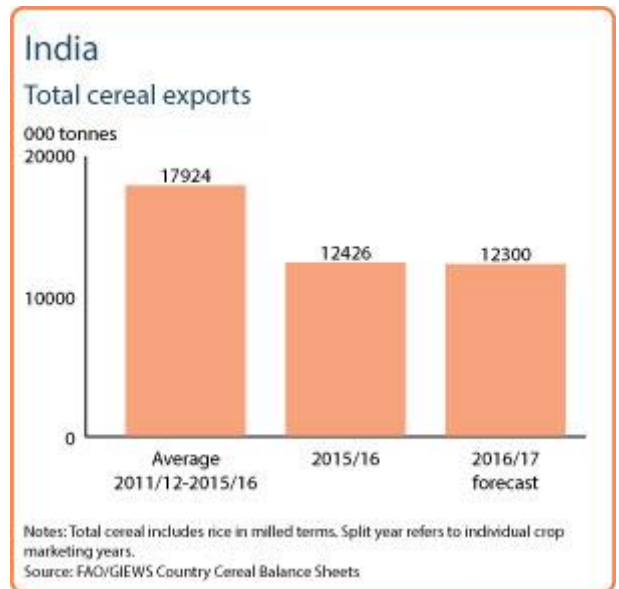
FAO forecasts wheat imports in the 2016/17 marketing year (April/March) at 2 million tonnes, the largest since 2006/07. This figure may increase further after Government's decision at the beginning of December 2016 to eliminate the import duty on wheat, amid high domestic prices ([FPMA Food Policies](#)).

Rice prices were stable or decreased, while those of wheat strengthened in November

Retail prices of rice were stable or decreased slightly in November reflecting improved supplies from the 2016 main season crop and the overall slow pace of sales abroad. Prices of wheat and wheat flour increased in most markets in November amid worries of reduced supplies due to a drawdown in stock levels. Against this backdrop, the Government is planning to release increased quantities of wheat through the Open Market Sale Scheme.

Overall food security satisfactory

The overall food security situation in India is satisfactory given the provision of highly-subsidized rice, wheat and coarse grains through distribution programmes, especially for the below poverty-line families through the National Food Security Act (NFSA). The NFSA was first passed in September 2013 and since then has gradually been rolled out throughout the country, covering all states and territories by November 2016 ([FPMA Food Policies](#)). The country is prone to floods during the monsoon season, which normally affect large numbers of people. This year, recurrent floods and landslides in July and August, mostly concentrated in the northeastern parts of the country, affected about 6 million people causing losses of human lives, livestock and flood supplies. Severe damage to housing and infrastructure has also been reported.





GIEWS Country Brief India

Reference Date: 24-August-2016

FOOD SECURITY SNAPSHOT

- Cereal production to rebound in 2016
- Total cereal exports in 2016/17 forecast close to last year's reduced level
- Rice prices rose marginally in July, while those of wheat were stable

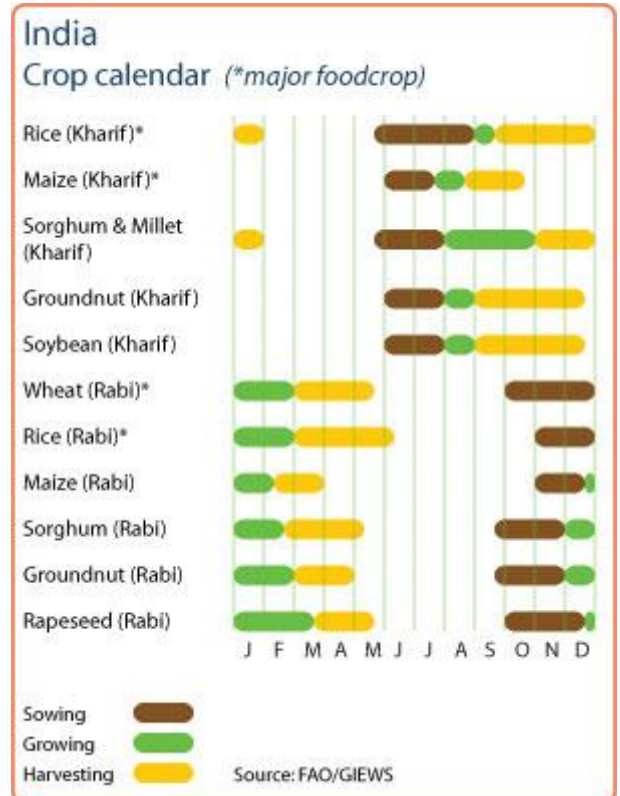
Cereal production to rebound in 2016

Planting of the 2016 main *Kharif* season crops, mostly rice and maize, started in June and will continue until the end of August. After a slow onset, the monsoon rains improved over large parts of the country from late June, benefitting planting activities and early crop development. Official estimates indicate that, as of 19 August, 52.66 million hectares had been put under main season cereals, up 5 percent from the progress a year earlier. Excessive precipitation since July triggered localized floods and landslides in northeastern parts of the country, hitting the states of Assam, Bihar and Madhya Pradesh the most. Although severe localized crop losses are likely in the most affected areas, the overall impact on the 2016 main season cereals is expected to be limited. Given continued Government support to the rice sector and assuming normal growing conditions for the remainder of the season, FAO forecasts the 2016 aggregate paddy production at 159 million tonnes. This would be a 3 percent recovery from last year's reduced output, affected by a poor monsoon performance. The 2016 maize output is also forecast to recover from last year's reduced level by 8 percent to 23.5 million tonnes, as both area and yields are expected to return to near-normal levels.

Latest official estimate puts the 2016 *Rabi* (winter) wheat crop, harvested by June, at 93.5 million tonnes, up 8 percent from last year's reduced output. A year-on-year contraction in plantings due to poor water supplies at sowing time was more than offset by record yields achieved as a result of favourable weather and improved irrigation water supplies during key stages of crop development.

Total cereal exports in 2016/17 forecast close to last year's reduced level

After two consecutive years of reduced outputs, cereal exports in 2016/17 marketing year (April/March) are forecast to remain close to the 2015/16 reduced level at 11.6 million tonnes, 35 percent below the five-year average. Although, wheat exports in 2016/17 are forecast to increase from last year's low level to 1.5 million tonnes, this is still well below the average. Similarly,



India Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Rice (paddy)	157,801	155,032	159,000	3
Wheat	91,528	86,530	93,500	8
Maize	22,852	21,810	23,500	8
Others	18,410	16,240	18,410	13
Total	290,591	279,612	294,410	5

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

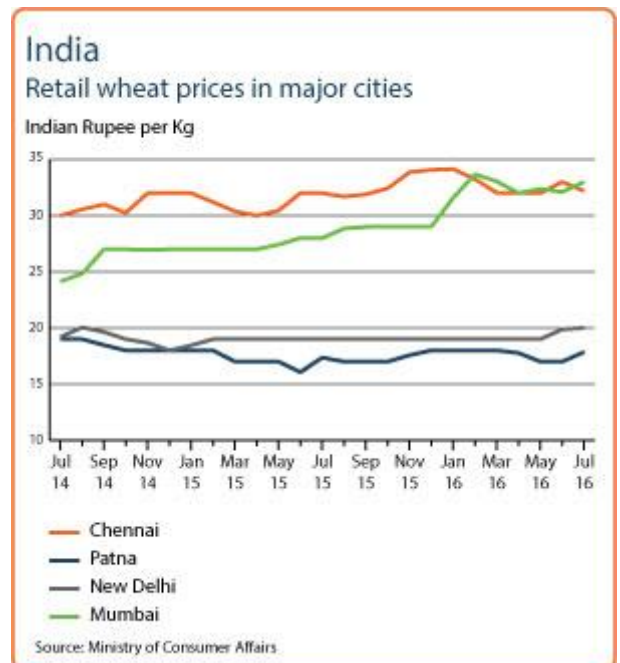
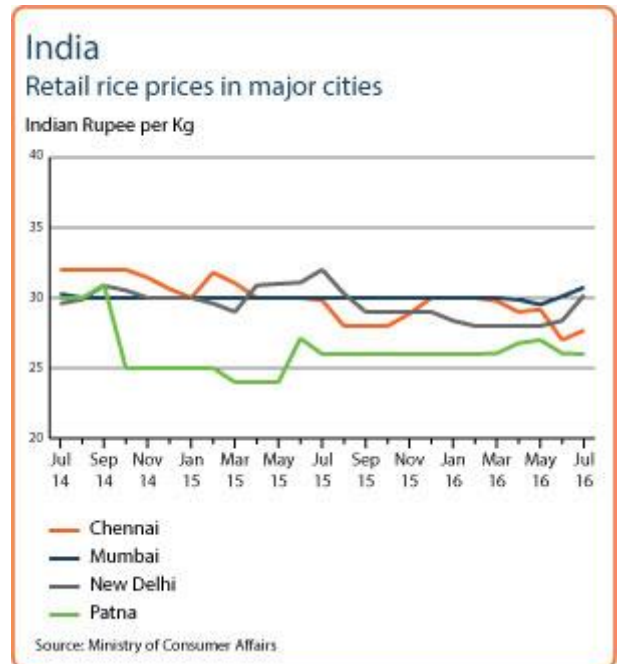
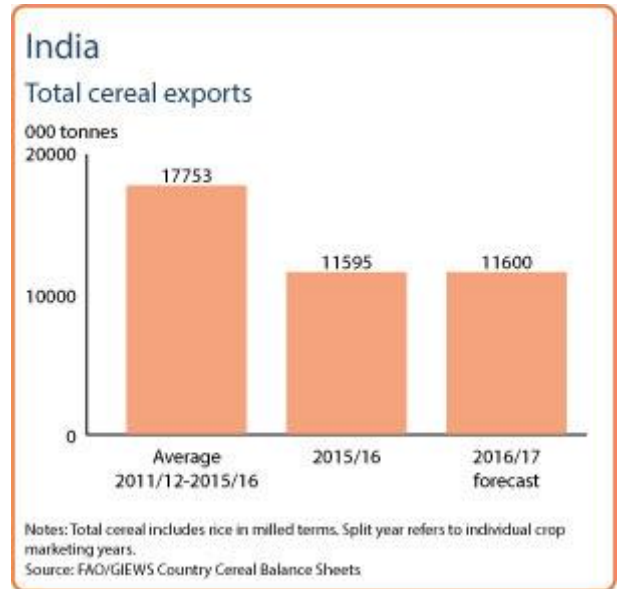
maize exports are also set to remain low: apart from reduced carryovers from the past two years, this also reflects increased domestic demand from the feed and starch industry. Rice exports in calendar year 2016 are forecast at 10 million tonnes, 10 percent below the 2015 high level, due to a combination of subdued demand and tighter exportable availabilities.

Rice prices rose marginally in July, while those of wheat were stable

Retail prices of rice rose marginally in most markets in July, supported by reduced 2015/16 secondary season crop. Prices of wheat were stable in July, reflecting adequate market supplies from the 2016 good harvest and continued release of Government's supplies through the Open Market Sale Scheme (OMSS).

Overall food security satisfactory

The overall food security situation in India is considered to be satisfactory, given ample food stocks and the provision of highly-subsidized rice, wheat and coarse grains through distribution programmes, especially for the below-poverty line families through the National Food Security Act (NFSA). As of May 2016, the NFSA has been implemented in 33 states out of 36 states/units, with presently about 724 million people already benefiting from the highly subsidized food grains under NFSA. India is prone to floods during the monsoon season, which normally affect large numbers of people. This year, recurrent floods and landslides since July mostly concentrated in the northeastern parts of the country, affected at least 5.9 million people in Assam and Bihar alone, causing deaths and injuries, loss of livestock and flood supplies. Severe damage to housing and infrastructure has also been reported.



Reference Date: 18-February-2016

FOOD SECURITY SNAPSHOT

- Dry conditions cause reduction in 2016 *Rabi* season plantings
- Poor monsoon rains lowered 2015 *Kharif* season cereal production
- Total cereal exports forecast to decrease markedly in 2015/16 marketing year
- Rice and wheat prices generally stable in January

Dry conditions cause reduction in 2016 *Rabi* season plantings

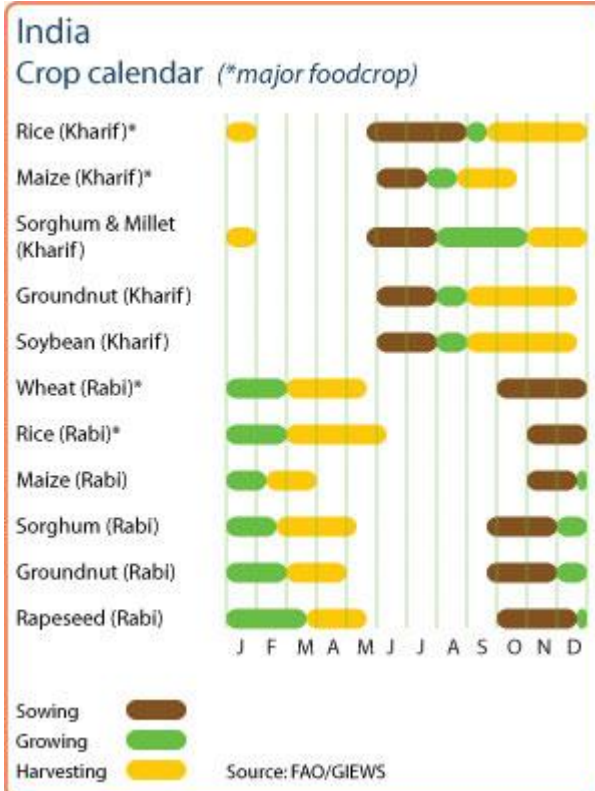
Planting of the 2016, mostly irrigated, *Rabi* (winter) crops, mainly wheat, was completed in January. Reduced water levels in major reservoirs, following weak monsoon precipitation, coupled with unseasonable high temperatures and below-average rains since October, associated with the ongoing El Niño event, reduced the area planted in major wheat producing states located in the north and northwest. Latest official estimates indicate that 29.3 million hectares were sown with wheat for the 2016 crop, 4 percent less than in the previous year. The recently released "Second Advance Estimate" from the Ministry of Agriculture puts the 2016 wheat production at 93.8 million tonnes, 8 percent above last year's reduced level but below 2014's record output. This forecast assumes yields return closer to average after 2015's low levels.

Similarly to wheat, reduced water availability hampered planting operations of the 2015 secondary (*Rabi*) rice crop. As a result, official estimates point to a 7 percent contraction in the area planted compared to the previous year. The final outcome of this season's harvests will depend on the availability of water supplies for irrigation and rainfall in the coming weeks, which are critical for crop development.

Poor monsoon rains lowered 2015 *Kharif* season cereal production

Harvesting of the 2015 main *Kharif* season crops, including rice and maize, was completed in January. The latest official estimate puts 2015 *Kharif* rice production at 90.6 million tonnes (milled basis), marginally below the reduced level of 2014. The decrease results from a contraction in plantings, especially in southern and central producing states, due to below-average monsoon rains. Including the forecast of the ongoing 2015 secondary (*Rabi*) crop, FAO tentatively forecasts the 2015 aggregate rice production (in paddy terms), at 155.4 million tonnes (103.6 million tonnes, milled basis), 2 percent below the reduced level in 2014.

Latest official estimates put the 2015 wheat production at 86.5 million tonnes, 10 percent below the previous year's record level. The decrease is the result of heavy rains, coupled with strong winds and localized hail in March over the northern and central main wheat-producing states, which damaged standing crops in the final stages of development.



India Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes		percent	
Rice (paddy)	155 587	158 210	155 407	-2
Wheat	90 382	95 850	86 530	-10
Maize	22 836	24 170	21 000	-13
Others	19 490	18 910	17 300	-9
Total	288 295	297 140	280 237	-6

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

The 2015 maize output is officially estimated to have decreased by 13 percent, compared to 2014's good level, to 21 million tonnes. The decrease reflects lower yields, following delayed and below-average monsoon rains.

Total cereal exports forecast to decrease markedly for second consecutive year in 2015/16

Cereal exports in the 2015/16 marketing year (April/March) are forecast to decrease markedly for the second consecutive year, falling to 12.5 million tonnes, some 27 percent down from 2014/15 and 25 percent below the average of the previous five years. Most of the decline reflects reduced wheat exports, which are forecast to decrease from 3.4 million tonnes to 1 million tonnes, mainly as result of lower 2015 output. Rice exports in calendar year 2016 are also forecast to decrease from last year's high level. Maize exports are set to decrease by 33 percent to 800 000 tonnes, due to lower production coupled with increased domestic demand from the feed and starch industry. The decline in the exportable surplus is also attributed to strong domestic requirements under the National Food Security Act, which has been approved in 2013 and is currently under implementation in most states.

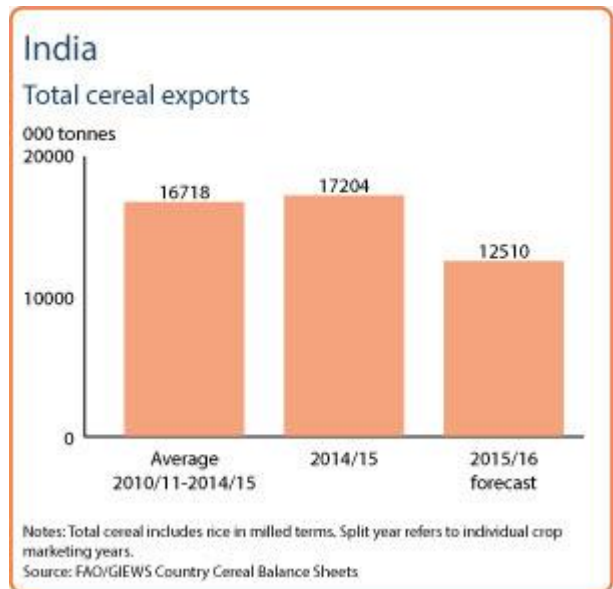
Rice and wheat prices generally stable in January

Retail prices of rice were stable in most markets in January, notwithstanding the progressive arrival of the 2015 main crop in the market, reflecting large ongoing Government procurement purchases. As of 12 January, the Food Corporation of India (FCI) and State Government Agencies had bought some 20.1 million tonnes of rice, compared to the 15.7 procured at the same time last year. Overall, rice prices were lower than their levels a year earlier.

Prices of wheat, another important staple, were stable in January, owing to the continued large release of Government's supplies through the Open Market Sale Scheme (OMSS). As of 22 January 2016, a total quantity of 4.8 million tonnes were sold through the OMSS since the beginning of the 2015/16 marketing year (April/March), with particularly high volumes sold in most recent months.

Overall food security satisfactory

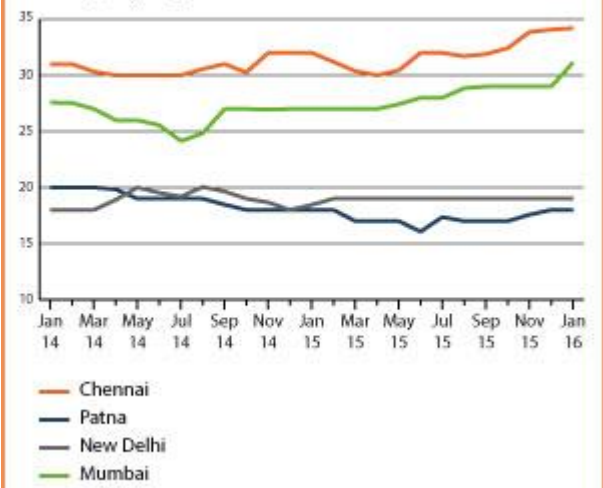
The overall food security situation in India is considered to be satisfactory, given ample food stocks and the provision of highly-subsidized rice and wheat through distribution programmes, especially for the below-poverty line families through the National Food Security Act (NFSA). Under the NFSA, about 75 percent of the rural and 50 percent of the urban population (nearly 800 million people) are entitled to receive subsidized food grains, including rice at INR 3 per kg, wheat at INR 2 per kg and coarse grains at INR 1 per kg. Additionally, the measure is providing free nutritious meals to pregnant women and children up to 14 years of age and entitlements of INR 6 000 (USD 91) per pregnancy to pregnant and lactating mothers. As of December 2015, the NFSA has been implemented in 25 States throughout India, from 11 during last year, with presently about 530 million people already benefiting from the highly subsidized food grains under NFSA. The implementation of the NFSA in the remaining 11 States/Union territories is likely to be complete by April 2016.



India

Retail wheat prices in major cities

Indian Rupee per Kg



Source: Ministry of Consumer Affairs

Reference Date: 16-April-2015

FOOD SECURITY SNAPSHOT

- Heavy rains and localized hail in March affected 2015 *Rabi* season wheat crop
- Poor monsoon rains lowered 2014 aggregate cereal production
- Total cereal exports estimated to have decreased markedly in 2014/15 marketing year (April/March)
- Rice and wheat prices were generally stable or weakened slightly in some markets in March

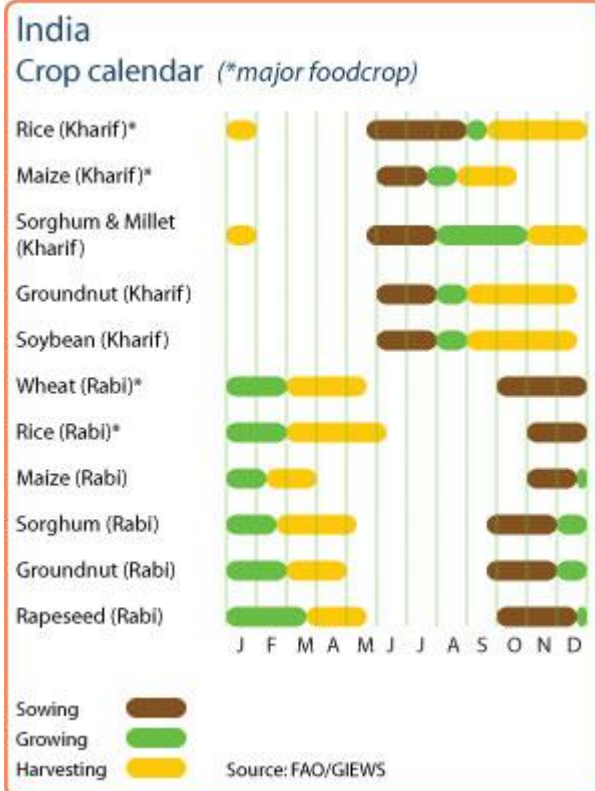
Heavy rains and localized hail in March affected 2015 *Rabi* season wheat crop

Harvesting of the 2015 mostly irrigated *Rabi* (winter) wheat crop has started in early March and will continue until mid-May. Despite favourable weather in January and February, heavy rains, coupled with strong winds and localized hail, during the first dekad of March over the northern and central main wheat producing states, is reported to have negatively affected the standing wheat crop in the final stages of development. According to preliminary reports, the most affected states include Haryana, Rajasthan, Punjab, Uttar Pradesh and Madhya Pradesh, which all together account for about 80 percent of the total wheat production. No detailed official estimate of the damage to the wheat crop is yet available, but preliminary reports indicate a reduction of some 4 percent in output, as well as lower quality of this year's crop. Pending a more detailed assessment, FAO has further lowered its 2015 wheat production forecast to 92 million tonnes. At the revised level, the 2015 wheat output would be 4 percent lower than the record level of 2014.

Planting of the 2015/16 main *Kharif* season crops, including rice and maize, will start in late May. Assuming a good monsoon season and continued Government support to the rice sector, FAO tentatively forecasts the 2015 aggregate rice production at 158.2 million tonnes, up 2 percent from the 2014 slightly reduced output. Early indications point to a small increase in the 2015 maize production to 22.5 million tonnes, as yields are projected to return to average, after low levels in 2014.

Poor monsoon rains lowered 2014 aggregate cereal production

Latest official forecasts for the 2014/15 secondary *Rabi* rice crop, currently being harvested, is set at 20.2 million tonnes, some 11 percent below last year's record level of the same season. Including the 2014 main *Kkharif* rice crop, harvested by January 2015, the 2014 aggregate rice output is set at 154.6 million tonnes, 3 percent below the 2013 record harvest. Similarly, the 2014 maize output is officially estimated to have decreased by 10 percent compared to the 2013 bumper level to 22 million tonnes. The estimated decreases reflect overall lower yields, following delayed and below-average monsoon rains during the *Kharif* main season, as well as localized floods in late July and late September 2014 in some northeastern areas of the country.



India
Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes		percent	
Rice (paddy)	154 856	154 552	158 242	2
Wheat	90 382	95 850	92 000	-4
Maize	22 426	22 030	22 500	2
Others	18 920	16 210	18 200	12
Total	286 584	288 642	290 942	1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Total cereal exports decreased markedly in 2014/15 marketing year (April/March)

Cereal exports in the 2014/15 marketing year (April/March) are estimated at 16.6 million tonnes, some 24 percent down from the 2013/14 high level, but still 14 percent above the previous five-year average. The decline in the exportable surplus is mainly attributed to strong domestic requirements under the National Food Security Act, which has been approved in 2013 and is currently under implementation in most states. Wheat exports are estimated at 3.8 million tonnes, more than one-third below the 2013/14 level, also considering the expected decline in this year's harvest. Rice exports in 2015 are forecast by FAO at 9.3 million tonnes, 18 percent below last year's record exports also as a result of an estimated lower harvest in 2014. Maize exports are set at 3.1 million tonnes, some 22 percent drop compared to the previous year's level, due to lower production combined with increased domestic demand from the feed and starch industry.

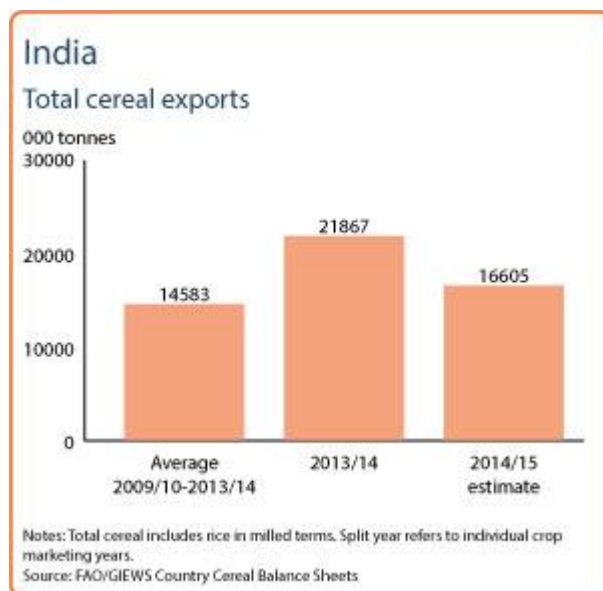
Rice and wheat prices were generally stable or weakened marginally in some markets in March

Retail prices of rice were generally stable or decreased slightly in some markets in March, with the downward pressure from the beginning of the 2015 secondary season harvest, partially offset by an expected decline in 2014/15 *Rabi* output and the ongoing Government's procurement programme.

Prices of wheat, another important staple, remained generally unchanged or weakened marginally in March in some markets, with the beginning of the 2015 main harvest. However, an expected decline in output and quality of the 2015 wheat crop, following adverse weather conditions have limited further price decreases.

Overall food security is considered to be satisfactory

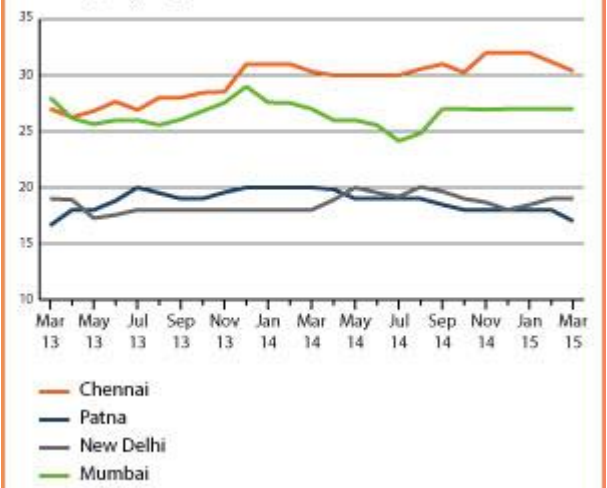
The overall food security in India is considered to be satisfactory given ample food stocks and the provision of highly subsidized rice and wheat through distribution programmes, especially for the below-poverty line families under the National Food Security Act. Under the "Food Security Bill", about 75 percent of the rural and 50 percent of the urban population (nearly 800 million people) are entitled to receive subsidized food grains, including rice at INR 3 per kg, wheat at INR 2 per kg and coarse grains at INR 1 per kg. On 4 April 2015, the Central Government of India has extended by six months for implementing the Food Security Act. As of early April 2015, 11 states throughout India have implemented the law.



India

Retail wheat prices in major cities

Indian Rupee per Kg



Source: Ministry of Consumer Affairs

Reference Date: 18-August-2015

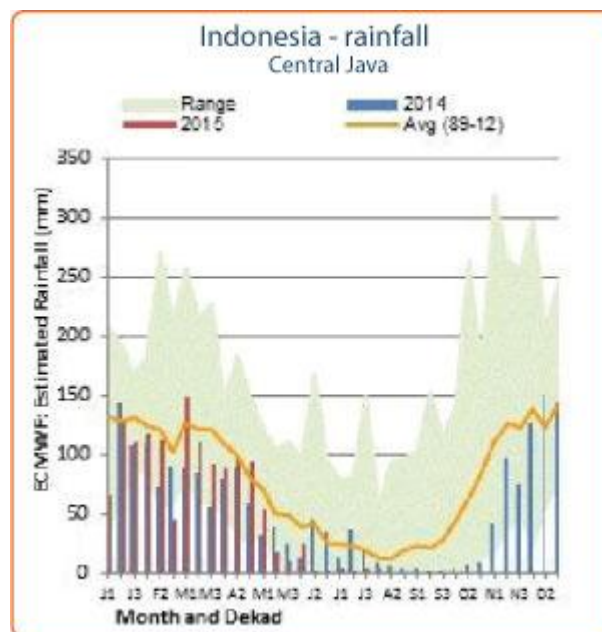
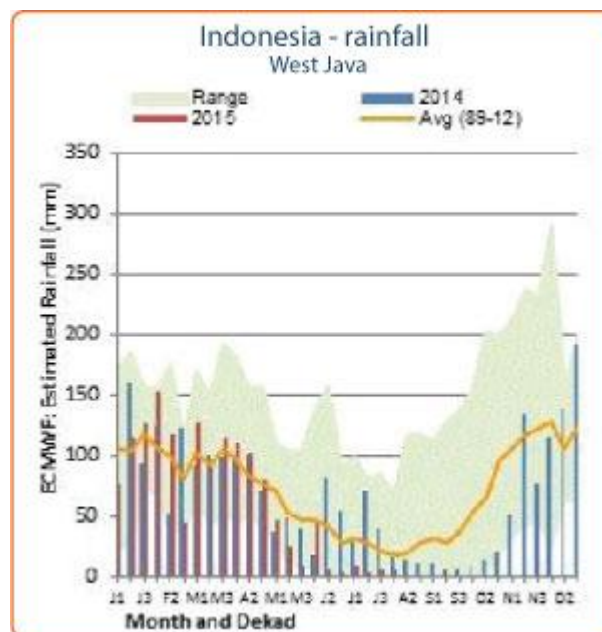
FOOD SECURITY SNAPSHOT

- Dry conditions affect 2015 secondary season crops in several parts of the country
- Overall prospects for 2015 aggregate rice production remain favourable
- Concern about negative impact of dry weather on food security of vulnerable rural populations
- Cereal imports forecast to increase in 2015/16 marketing year (April/March)
- Rice prices stable in July but at high levels

Dry conditions affect 2015 secondary season crops in parts

Harvesting of the 2015 secondary season paddy crop is currently underway and will continue until September. Lower-than-average rainfall between May and early August over localized areas of the main rice producing provinces, including West Java, East Java, Central Java, South Sulawesi and North Sumatra hindered planting operations and reportedly caused some yield reduction to this season's crops. In early August, the National Disaster Management Agency stated that 102 districts in 16 provinces, out of the country's 34 provinces were affected by drought. Early official estimates indicate that about 111 000 hectares of paddy plantings have been affected by the current dry weather. The annual area planted to rice is around 14 million hectares. There is also some concern about the potential impact of the dry conditions on plantings of the minor third season rice crop, which has just started and will continue into September. The Government plans to allocate IDR 880 billion (USD 65 million) to ensure water supplies through the rehabilitation of irrigation channels and distribution of water pumps to affected farmers. The 2015 main season paddy crop, which accounts for the bulk of the annual production, was completed in April. Despite a delayed onset of the rainy season, good rains through the growing season, coupled with diverse initiatives launched by the Government to support production, such as the distribution of subsidized seeds and fertilizers, resulted in increased plantings and improved yields. Thus, and barring a further deterioration of prospects for secondary and third seasons crops due to dry weather, given the gains already achieved with the main harvest, the outlook for the 2015 aggregate rice production remains positive. Forecast released by the Indonesian Government in July put the 2015 paddy production at 75.6 million tonnes, up 7 percent from the last year's reduced output level and an all-time record.

Harvesting of the 2015 main (rainy) season maize crop, which accounts for 65 percent of annual production, was completed in April and the secondary (dry) season crop is in the final development stage. Latest official forecasts put the 2015 aggregate maize output at 20.7 million tonnes, some 9 percent above the last year's bumper level. The projected increase is the result of a 4 percent expansion in plantings, in response to higher demand from the domestic feed industry, as well as good yields during the main season. However, the final outcome of this year's output will depend on the rainfall



Indonesia				
Cereal production				
	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Rice (paddy)	68 682	70 846	75 551	7
Maize	18 576	19 008	20 667	9
Others	0	0	0	0
Total	87 257	89 854	96 218	7

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

performance in the coming months.

The ongoing dry weather may be attributed to the current global El Niño event, which is often associated with dry weather in the country, although, no precise quantitative association between the occurrence of El Niño and its impact on agricultural production can be deduced. Its impact on crops very much depends on the timing and intensity of the phenomenon. The consensus of ENSO prediction models project the El Niño event to continue throughout 2015, with many predicting Sea Surface Temperature (SST) anomalies to continue until the first months of 2016. The Indonesian Agency for Meteorological, Climatological and Geophysics (BMKG), forecasts that parts of the country may experience severe dry weather over the coming months.

Concern about negative impact of dry weather on food production of vulnerable rural population

Although overall bumper rice and maize outputs are forecast for 2015, crop losses could be significant at local level. No estimates of affected population groups are yet available, but large numbers of subsistence farming families particularly in the 102 districts of the 16 provinces declared in drought situation, are likely to be affected the most. If rains do not improve in the coming weeks, the affected rural families may need assistance in the short term, including in the form of agricultural inputs for the next main cropping season.

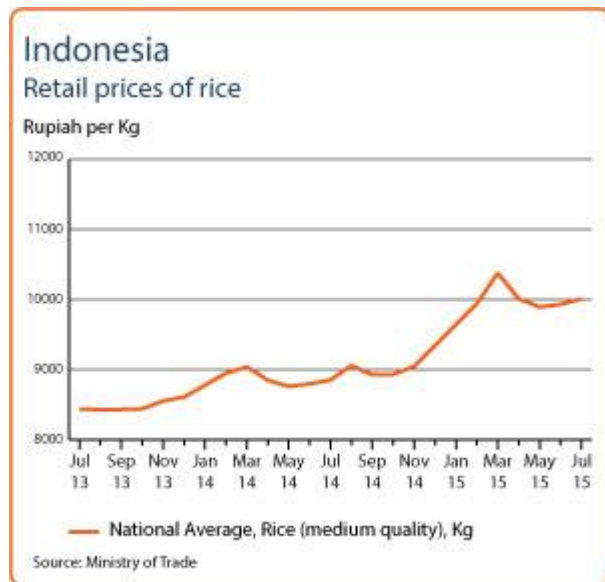
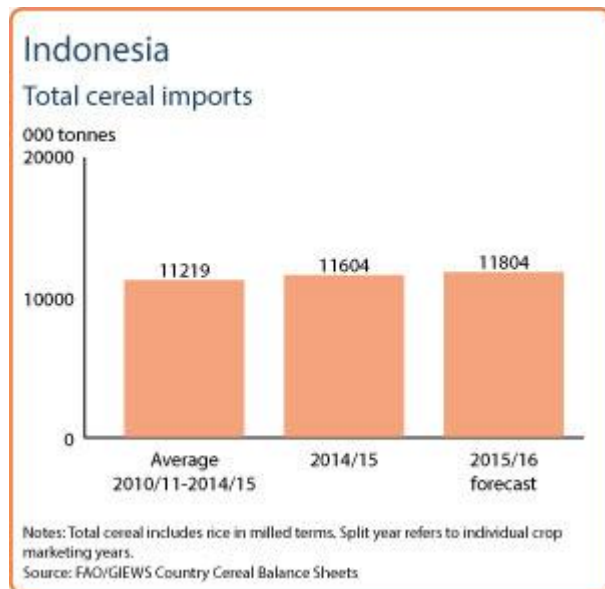
GIEWS is closely monitoring weather developments and the food situation, particularly in the most vulnerable eastern parts of the country. FAO and WFP country offices in coordination with the Government are providing technical support to monitor and increase preparedness to mitigate any potential negative impact of El Niño on vulnerable populations.

Cereal imports forecast to increase in 2015/16 marketing year (April/March)

Indonesia is one of the biggest importers of cereals in Far East Asia. Overall, cereal imports for the 2015/16 marketing year (April/March) are forecast at 11.8 million tonnes, some 2 percent above the large volume of the previous year. This is mainly attributed to an anticipated 3 percent increase in wheat imports to 7.9 million tonnes, reflecting sustained demand for the commodity. Similarly, imports of maize are forecast at 3 million tonnes, 4 percent above the last year's level. In contrast, the 2015 rice imports are forecast to decrease by 10 percent to 900 000 tonnes, as a result of the currently still favourable outlook for the overall 2015 rice production, and self-sufficiency policies advocated by Government.

Rice prices stable in July but still at high levels

The average prices of medium quality rice, the main staple in the country, remained stable for the second consecutive month in July but at near-record levels. This reflects harvest delays, coupled with significant lower imports since the beginning of 2015 compared to the same period last year, along with higher fuel and transport costs. Prices were also supported by concerns over the possible impact of the El Niño phenomenon on the ongoing secondary season crop.



Reference Date: 10-April-2015

FOOD SECURITY SNAPSHOT

- Heavy rains and localized hail in March affected 2015 *Rabi* season wheat crop
- Poor monsoon rains lowered 2014 aggregate cereal production
- Total cereal exports estimated to have decreased markedly in 2014/15 marketing year (April/March)
- Rice and wheat prices were generally stable or weakened slightly in some markets in March

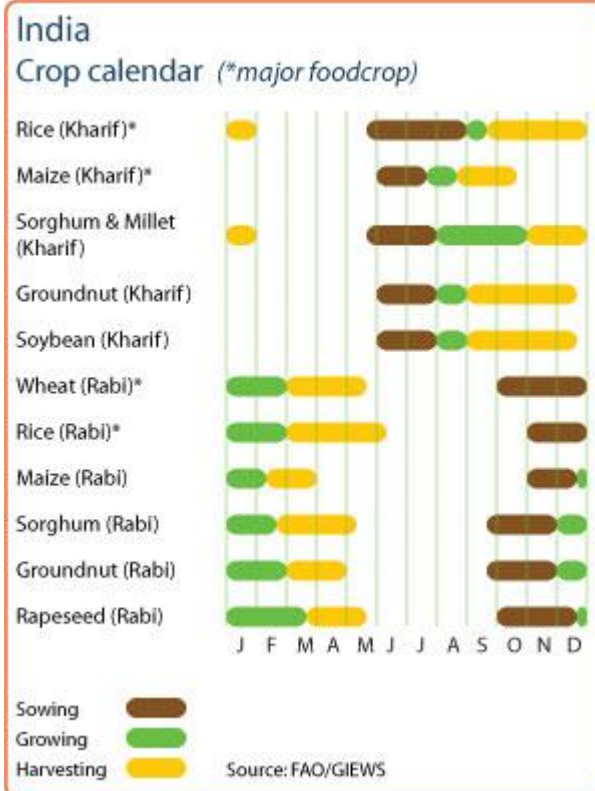
Heavy rains and localized hail in March affected 2015 *Rabi* season wheat crop

Harvesting of the 2015 mostly irrigated "*Rabi*" (winter) wheat crop has started in early March and will continue until mid-May. Despite favourable weather in January and February, heavy rains, coupled with strong winds and localized hail, during the first dekad of March over the northern and central main wheat producing states, is reported to have negatively affected the standing wheat crop in the final stages of development. According to preliminary reports, the most affected states include Haryana, Punjab, Uttar Pradesh and Madhya Pradesh, which all together account for about 75 percent of the total wheat production. No official estimate of the damage to the wheat crop is yet available, but preliminary reports indicate a reduction in output and quality of this year's crop. Pending a more detailed assessment, FAO has lowered its 2015 wheat production forecast by 1.8 million tonnes since early March, to 94 million tonnes. At the revised level, the 2015 wheat output would be 2 percent lower than that of 2014, but still be the third best on record.

Planting of the 2015/16 main "*Kharif*" season crops, including rice and maize, will start in late May. Assuming a good monsoon season and continued Government support to the rice sector, FAO tentatively forecasts the 2015 aggregate rice production at 158.2 million tonnes, up 2 percent from the 2014 slightly reduced output. Early indications point to a small increase in the 2015 maize production to 22.5 million tonnes, as yields are projected to return to average, after low levels in 2014.

Poor monsoon rains lowered 2014 aggregate cereal production

Latest official forecasts for the 2014/15 secondary "*Rabi*" rice crop, currently being harvested, is set at 20.2 million tonnes, some 11 percent below last year's record level of the same season. Including the 2014 main "*Kharif*" rice crop, harvested by January 2015, the 2014 aggregate rice output is set at 154.6 million tonnes, 3 percent below the 2013 record harvest. Similarly, the 2014 maize output is officially estimated to have decreased by 10 percent compared to 2013 bumper level to 22 million tonnes. The estimated decreases reflect overall lower yields, following delayed and below-average monsoon rains during the "*Kharif*" main season, as well as localized floods in late July and late September 2014 in some



India Cereal production

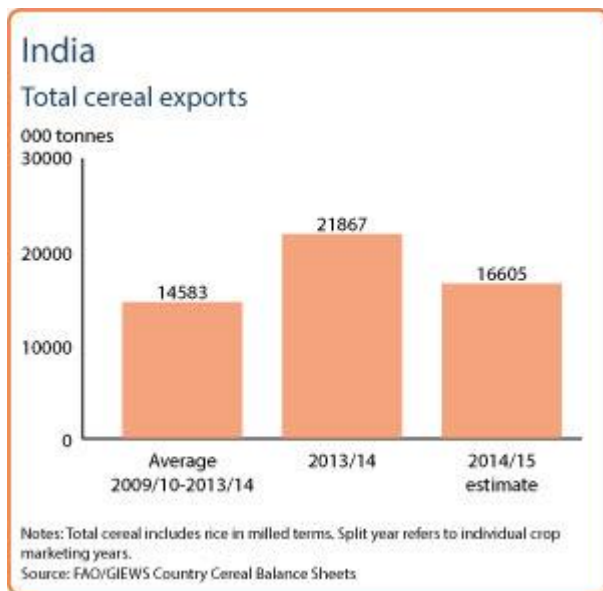
	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes		percent	
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Wheat	90 382	95 850	94 000	-2
Maize	22 426	22 030	22 500	2
Others	18 920	16 210	18 200	12
Total	286 584	288 642	292 942	1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

northeastern areas of the country.

Total cereal exports decreased markedly in 2014/15 marketing year (April/March)

Cereal exports in the 2014/15 marketing year (April/March) are estimated at 16.6 million tonnes, some 24 percent down from the 2013/14 high level, but still 14 percent above the previous five-year average. The decline in the exportable surplus is mainly attributed to strong domestic requirements under the National Food Security Act, which has been approved in 2013 and is currently under implementation in most states. Wheat exports are estimated at 3.8 million tonnes, more than one-third below the 2013/14 level. Rice exports in 2015 are forecast by FAO at 9.3 million tonnes, 18 percent below last year's record exports also as a result of an estimated lower harvest in 2014. Maize exports are set at 3.1 million tonnes, some 22 percent drop compared to previous year's level, due to lower production combined with increased domestic demand from the feed and starch industry.



Rice and wheat prices were generally stable or weakened marginally in some markets in March

Retail prices of rice were generally stable or decreased slightly in some markets in March, with the downward pressure from the beginning of the 2015 secondary season harvest, partially offset by an expected decline in 2014/15 "Rabi" output and the ongoing Government's procurement programme.

Prices of wheat, another important staple, remained generally unchanged or weakened marginally in March in some markets, with the beginning of the 2015 main harvest. However, an expected decline in output and quality of the 2015 wheat crop, following adverse weather conditions have limited further price decreases.

Overall food security is considered to be satisfactory

The overall food security in India is considered to be satisfactory given ample food stocks and the provision of highly subsidized rice and wheat through distribution programmes, especially for the below-poverty line families under the National Food Security Act. Under the "Food Security Bill", about 75 percent of the rural and 50 percent of the urban population (nearly 800 million people) are entitled to receive subsidized food grains, including rice at INR 3 per kg, wheat at INR 2 per kg and coarse grains at INR 1 per kg. On 4 April 2015, the Central Government of India has extended by six months for implementing the Food Security Act. As of early April 2015, 11 states throughout India have implemented the law.



India

Retail wheat prices in major cities

Indian Rupee per Kg



Source: Ministry of Consumer Affairs

Reference Date: 26-February-2015

FOOD SECURITY SNAPSHOT

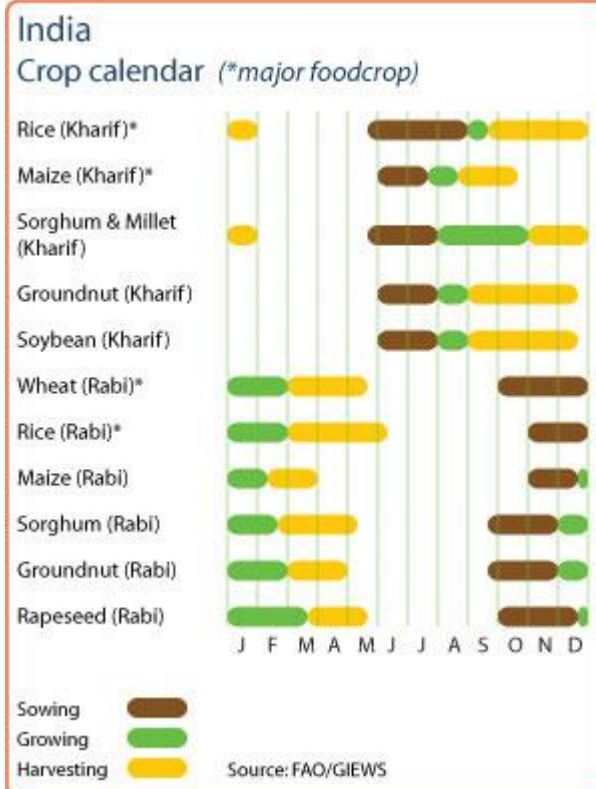
- 2015 “Rabi” season wheat production officially forecast close to last year’s record level
- Poor monsoon rains reduced 2014 “Kharif” season cereal production
- Cereal exports forecast to decrease considerably in 2014/15 marketing year (April/March)
- Rice and wheat prices were generally stable in recent months, despite increases in some markets

2015 “Rabi” season wheat production forecast close to last year’s record level

Planting of the 2015 “Rabi” season cereal crops, including wheat and rice, was completed in December. Reduced water levels in major reservoirs, following weak monsoon precipitation, coupled with below-average rains in October and November over most of the country, delayed somewhat planting operation for winter crops. Rains resumed to normal patterns from December to mid-February, particularly over the main wheat producing areas in the northwestern and central parts of the country, allowing plantings to pick up and improve irrigation supplies and soil moisture conditions for the wheat crop during the critical stages of growth. Latest official estimates, as of 13 February 2015, indicate that 30.6 million hectares have been placed under the wheat crop, 3 percent less than the area planted at the same time in 2014. However, favourable rainfall in the second part of the growing season, sufficient irrigation water supplies and adequate fertilizer use has resulted in higher yields forecast which is expected to compensate for the contraction in plantings. As a result, the “Second Advance Estimate” released by the Ministry of Agriculture on 18 February put the 2015 winter wheat “Rabi” crop at 95.8 million tonnes, similar to the 2014 record level.

Poor monsoon rains reduced the 2014 “Kharif” season cereal production

Harvesting of the 2014 main “Kharif” season crops, including rice and maize, was completed in January. The latest official estimate puts the 2014 “Kharif” rice production at 134.3 million tonnes, 2 percent below last year’s same season bumper crop. With a slightly higher area sown, the decrease is the result of lower yields, following delayed and below-average monsoon rains, as well as localized floods in late July and late September in some northeastern areas of the country, including parts of Assam, Bihar and Uttar Pradesh and Odisha states. Including the forecast of the ongoing 2014/15 “Rabi” secondary crop, the 2014 aggregate rice production is officially set at 154.6 million tonnes, 3 percent below the 2013 record output. Latest official forecasts put the 2014 maize production at 22 million tonnes, 10 percent below last year’s record level. This is the result of a 5 percent contraction in plantings and anticipated lower yields, as a result of the below-average rains at the start of the cropping season.



India Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Rice (paddy)	150 672	159 967	154 552	-3
Wheat	87 348	93 510	95 850	3
Maize	21 364	24 350	22 030	-10
Others	19 112	18 800	16 210	-14
Total	278 496	296 627	288 642	-3

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Cereal exports forecast to decrease markedly in 2014/15 marketing year (April/March)

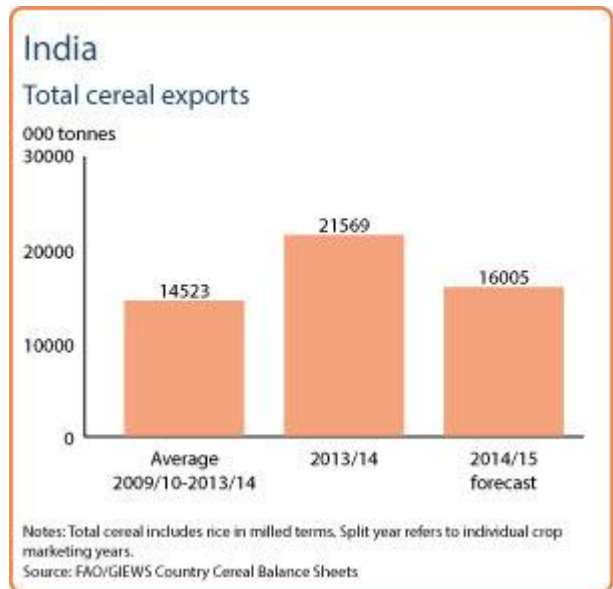
Cereal exports for the 2014/15 marketing year (April/March) are forecast at 16 million tonnes, some 26 percent down from the 2013/14 high level but 10 percent above the previous five-year average. The anticipated decrease in the exportable surplus is mainly attributed to strong domestic requirement under the National Food Security Act, which has been approved in 2013 and is currently under implementation in most states. Wheat exports are forecast at 4 million tonnes, one-third below the estimated exports in 2013/14. Rice exports in 2015 are forecast by FAO at 8.8 million tonnes, 20 percent below last year's record exports. This is also as a result of an estimated lower harvest this year and a reduction in demand from its key basmati importer, the Islamic Republic of Iran. Maize exports are set at 2.7 million tonnes, some 32 percent drop compared to last year's level, as a result of lower production combined with increased domestic demand from the feed and starch industry.

Rice and wheat prices were generally stable in past months, despite increases in some markets

Retail prices of rice were generally stable in January in most markets, reflecting low trade activity, coupled with the ongoing Government's procurement programme that offset the downward pressure on prices from the recently-concluded 2014 main "Kharif" harvest. During the 2014/15 marketing year (October/September), the Government targets to procure 30.05 million tonnes of rice at prices 4 percent higher than the previous year. Prices of wheat, another important staple, remained generally unchanged, due to adequate supplies following last year's record harvest. However, notwithstanding these general trends in several markets, rice and wheat prices rose considerably in January over the last month, including in the capital city, Delhi. Retail prices of fresh vegetables (eggplants and onions) were generally stable or declined in several markets of the country in January, but increased considerably compared to the previous month in the Delhi market. Overall, vegetable prices were well above their year-earlier levels throughout most markets of the country.

High food prices in some markets cause food insecurity to increase at local level

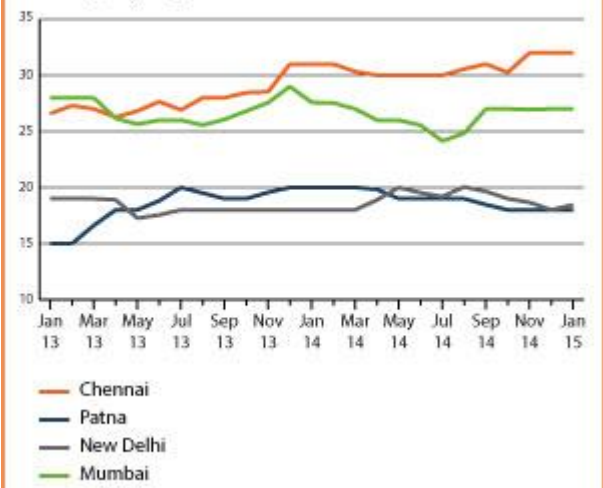
The overall food security in India is considered to be satisfactory given the 2013 and 2014 good cereal harvests, ample food stocks and the provision of highly subsidized rice and wheat through distribution programmes, especially for the below-poverty line families under the National Food Security Act. Under the "Food Security Bill", about 75 percent of the rural and 50 percent of the urban population (nearly 800 million people) are entitled to receive subsidized food grains, including rice at INR 3 per kg, wheat at INR 2 per kg and coarse grains at INR 1 per kg. On 9 October, the Central Government of India has imposed all State Governments to implement the Food Security Act until April 2015. As of December 2014, 11 states throughout India have implemented the law. However, the relatively high prices of primary commodities in some markets are affecting the food security of the population with low incomes constraining their access to food.



India

Retail wheat prices in major cities

Indian Rupee per Kg



Source: Ministry of Consumer Affairs

Reference Date: 31-October-2014

FOOD SECURITY SNAPSHOT

- Delayed and erratic monsoon rains anticipated to reduce slightly 2014 “*kharif*” season cereal production
- Cereal exports forecast to decrease considerably in 2014/15 marketing year (April/March)
- Rice and wheat prices generally stable but at high levels
- Foods and high food prices cause food insecurity levels to increase

Delayed and erratic monsoon rains to reduce slightly 2014 “*kharif*” season cereal production

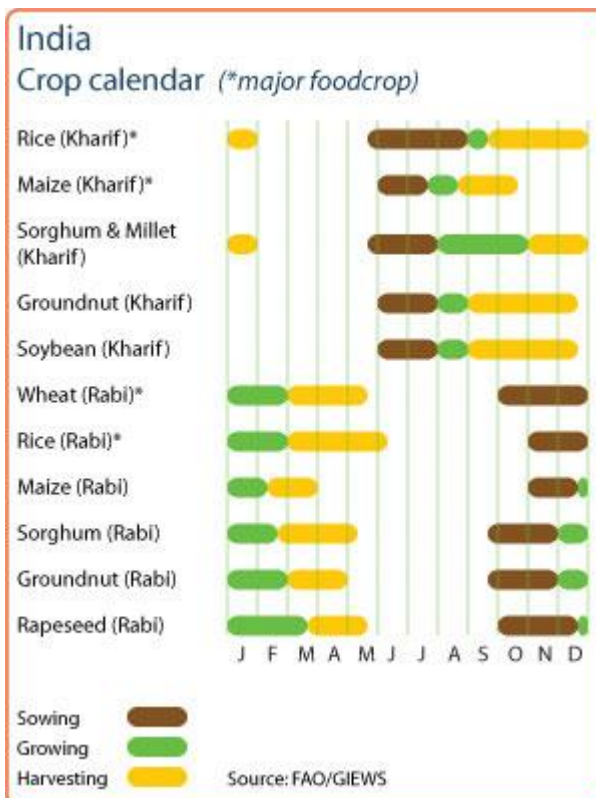
Harvesting of the 2014 main “*kharif*” season crops, including rice and maize, is currently underway. Late and below-average monsoon rains over the main cereal producing areas in June and early July significantly delayed planting and hampered early crop development. However, rains resumed at a more normal pattern since mid-July improving soil moisture and permitting rice transplanting operations to pick up. Official estimates, as of 26 September, indicate that 37.5 million hectares have been placed under rice crop, slightly above the area planted at the same time in 2013. Successively, excessive rains during the second part of the monsoon season led to localized floods in late July and late September, resulting in crop losses in the some northeastern areas of the country, including parts of Assam, Bihar and Uttar Pradesh and Odisha states, and lowering yield potential. As a result, FAO’s latest forecast puts the 2014 “*kharif*” rice production at 135 million tonnes, 2 percent below last year’s same season bumper crop. Assuming an average forthcoming 2014/15 “*rabi*” secondary crop, FAO tentatively forecasts the 2014 aggregate rice production at 156 million tonnes, 2 percent below the 2013 record output but 4 percent above the five-year average.

Latest official forecasts put the 2014 maize production at 22 million tonnes, 10 percent below last year’s record level. This is the result of a 5 percent contraction in plantings and anticipated lower yields, as a result of the below-average rains at the start of the cropping season.

Planting of the 2015 “*rabi*” (winter) wheat crop started in early October and is expected to continue until December. The official target for the 2015/16 “*rabi*” wheat production has been set at 94 million tonnes, slightly below last year’s record high, as yields are expected to return to average levels.

Cereal exports forecast to decrease markedly in 2014/15 marketing year (April/March)

Cereal exports for the 2014/15 marketing year (April/March) are forecast at 13.7 million tonnes, some 32 percent down from the 2013 high level and slightly below the previous five-year average. Overall, the anticipated decrease in the exportable surplus is attributed to strong domestic requirement under the National Food Security Act, approved in 2013. Wheat exports are forecast at



India Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Rice (paddy)	150 639	159 802	155 992	-2
Wheat	87 348	93 510	95 910	3
Maize	21 364	24 350	22 030	-10
Others	19 546	18 850	16 290	-14
Total	278 896	296 512	290 222	-2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

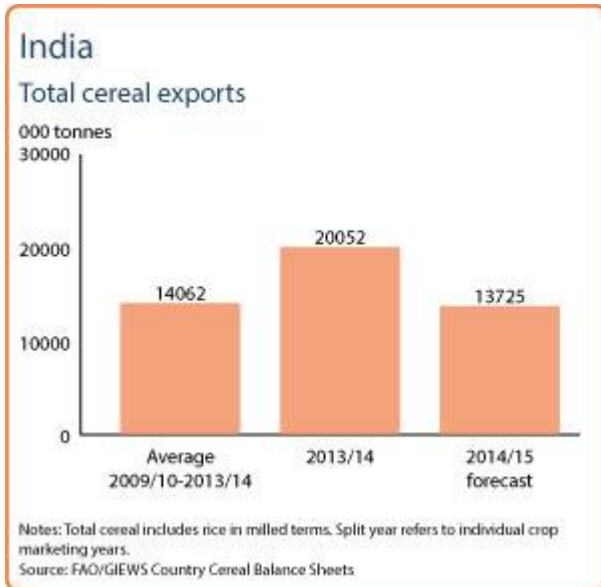
3 million tonnes, half the estimated exports in 2013/14, while those of rice and maize are expected to fall by 20 percent to 8 million tonnes and 33 percent to 2.7 million tonnes from last year's level, respectively, also as a result of anticipated lower harvests this year.

Rice and wheat prices generally stable but at high levels

Retail prices of rice in late October were stable or decreased in some markets reflecting the arrival of new supplies from the ongoing 2014 main season "*kharif*" crop and generally weak export demand. However, further price decreases were offset by the recently started Government's procurement programme for the 2014/15 marketing year (October/September), which targets to procure 30.05 million tonnes of rice. Common rice varieties are purchased at INR 13 600 (USD 223) per tonne while Grade A paddy at INR 14 000 (USD 229) per tonne, both 4 percent higher than in the previous year. Prices of wheat, another important staple, remained generally firm in most markets and above the levels of the same month last year, despite ample state reserves. Prices were supported by large Government procurement purchases, which began in April at a higher Minimum Support Price (MSP) compared to the previous year.

Floods and high food prices in some markets cause food insecurity to increase at local level

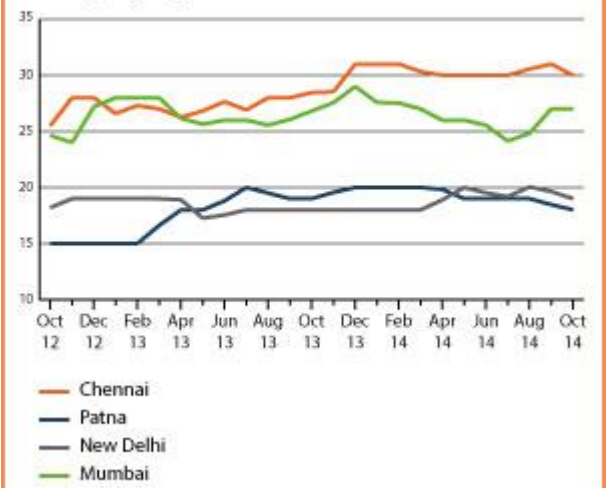
The overall food security in India is considered to be satisfactory given the 2013 and 2014 good cereal harvests, ample food stocks and the provision of highly subsidized rice and wheat through distribution programmes, especially for the below-poverty line families under the National Food Security Act. Under the "Food Security Bill", about 75 percent of the rural and 50 percent of the urban population (nearly 800 million people) are entitled to receive subsidized food grains, including rice at INR 3 per kg, wheat at INR 2 per kg and coarse grains at INR 1 per kg. However, the recent floods in northeastern parts of the country caused the loss of hundreds of lives, displaced almost 1 million people and adversely affected more than 3 million. Severe damage to housing, infrastructure and agriculture is also reported. Furthermore, the relatively high prices of primary commodities in some markets are affecting the food security of the population with low incomes constraining their access to food.



India

Retail wheat prices in major cities

Indian Rupee per Kg



Source: Ministry of Consumer Affairs

Reference Date: 24-July-2014

FOOD SECURITY SNAPSHOT

- Prospects for the 2014 main season rice and maize crops improved with recent rains
- Cereal exports decreased in 2013/14 marketing year (April/March)
- Rice and wheat prices generally stable in June but above their year-earlier levels in several markets
- Food security concerns remain for the vulnerable groups of population due to high prices

Prospects for the 2014 main season rice and maize crops improved with recent rains

Planting of the 2014 main *Kharif* season crops, including rice and maize, is currently underway with significant delays due to below-average monsoon rains over the main producing areas in June and early July. According to the India Meteorological Department (IMD) the cumulative rainfall for the country as a whole from the first dekad of June to the first dekad of July has been 42 percent below the normal levels. Official estimates, as of 11 July, indicate that 8.6 million hectares have been placed under rice crop, some 21 percent below the area planted at the same time in 2013. However, rains resumed at a more normal pattern since mid-July over the main eastern and central crop-producing areas improving soil moisture and permitting rice transplanting operations to pick up. Assuming normal monsoon rains for the remainder of the season and taking into account continued Government support to the rice sector, FAO tentatively forecasts the 2014 aggregate rice production (including the ongoing 2014 main and the 2014/15 secondary seasons) at 157.5 million tonnes, slightly below the 2013 record output but 5 percent above the five-year average.

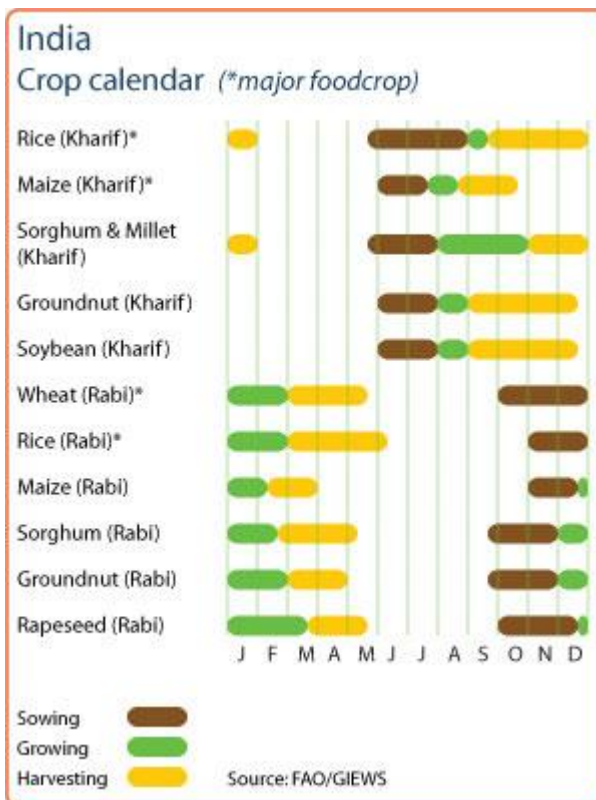
Early indications point also to a decrease in 2014 maize production to 22 million tonnes, as yields are projected to return to average, after record levels in 2013.

The 2014 Rabi (winter) wheat crop, harvested by June, is officially estimated at a record level of 95.9 million tonnes, up 3 percent from last year's bumper output. This is the result of a 6 percent expansion in plantings and near-record yields reflecting adequate supplies of irrigation water, fertilizers and other inputs and generally favourable weather conditions.

Record 2013 aggregate cereal harvest estimated

The 2013 aggregate rice and maize productions were officially estimated at record levels of 159.4 million tonnes and 24.2 million tonnes respectively, marginally above the good 2012 outcome. The bumper aggregate cereal production for the second consecutive year reflect good monsoon rains and adequate supplies of subsidized agricultural inputs, including seeds, fertilizers and fuel.

Total cereal exports decreased in 2013/14 marketing year (April/March) but still the second



India Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Rice (paddy)	150,564	159,427	157,500	-1
Wheat	87,348	93,510	95,850	3
Maize	21,332	24,190	22,000	-9
Others	19,546	18,850	18,500	-2
Total	278,789	295,977	293,850	-1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

highest on record

Cereal exports for the 2013/14 marketing year (April/March) are estimated at 20 million tonnes, some 9 percent below the all-time highs of the previous year but still the second highest on record. This good level of export reflects the bumper harvest in 2013 and large carryover stocks. India is expected to remain one of the world's major rice exporters, with shipments of 10 million tonnes.

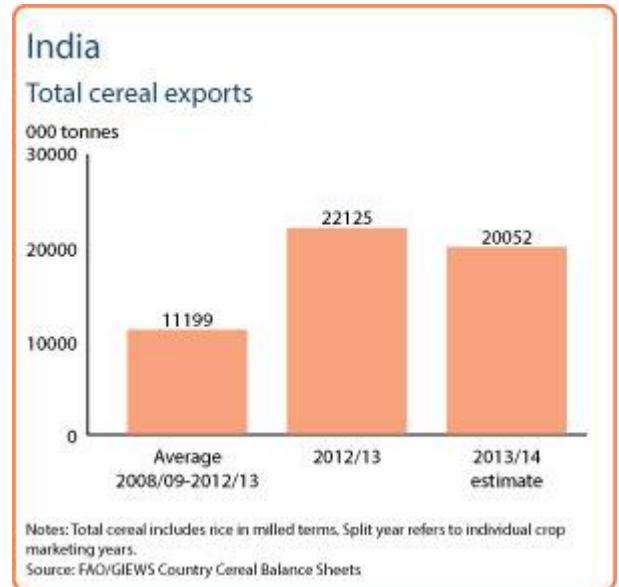
Rice and wheat prices generally stable

The retail rice prices in June remained generally stable in most markets of the country, as the downward pressure from the record 2014 secondary season harvest, completed in early June, was offset by the Government's ongoing procurement programme, which started in October 2013 and will last until September 2014 and targets to procure 34.5 million tonnes of rice. In an attempt to stabilize rice prices, the Government approved, in mid-June, the release of 5 million tonnes of rice from state inventories. Prices of wheat remained stable or decreased in some markets, with improved supplies from the record 2014 harvest, completed in May. However, further price decreases were offset by large Government procurement purchases, ongoing since April at a higher Minimum Support Price (MSP) compared to the previous season.

According to the Central Statistics Office the year-on-year inflation was recorded at 7.3 percent in June 2014.

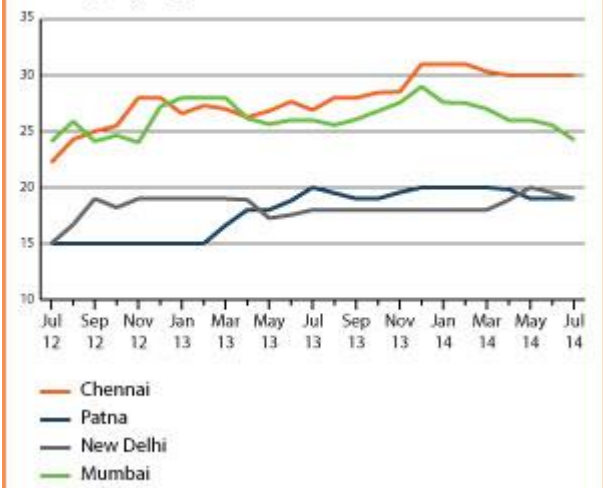
Food security concerns remain for the vulnerable groups of population due to high prices

The overall food security in India is considered to be satisfactory given the recent good cereal harvest, ample food stocks and the provision of highly subsidized rice and wheat through distribution programmes, especially for the below-poverty line families under the National Food Security Act. Under the "Food Security Bill" approved on 12 September 2013, about 75 percent of the rural and 50 percent of the urban population are entitled to receive subsidized food grains, including rice at INR 3 per kg, wheat at INR 2 per kg and coarse grains at INR 1 per kg. However, the relatively high prices of primary commodities in several markets are affecting the food security of the population with low incomes constraining their access to food.



India Retail wheat prices in major cities

Indian Rupee per Kg



Source: Ministry of Consumer Affairs

Reference Date: 11-June-2014

FOOD SECURITY SNAPSHOT

- Record 2014 wheat production forecast
- Aggregate 2013 cereal output estimated at a near-record level
- Cereal exports decreased in 2013/14 marketing year (April/March)
- Rice and wheat prices generally stable but at high levels
- Food security concerns remain for the vulnerable groups of population due to high prices

The 2014 wheat production forecast at a record level

Harvesting of the 2014 mostly irrigated *Rabi* (winter) wheat crop began in early March and is expected to continue until late May. FAO's latest forecast puts the 2014 wheat crop at a record level of 96 million tonnes, up 3 percent from last year's bumper output. The increase is mainly attributed to a 2 percent expansion in plantings and anticipated near-record yields reflecting generally good rainfall during the growing season, as well as adequate supplies of irrigation water, fertilizers and other inputs.

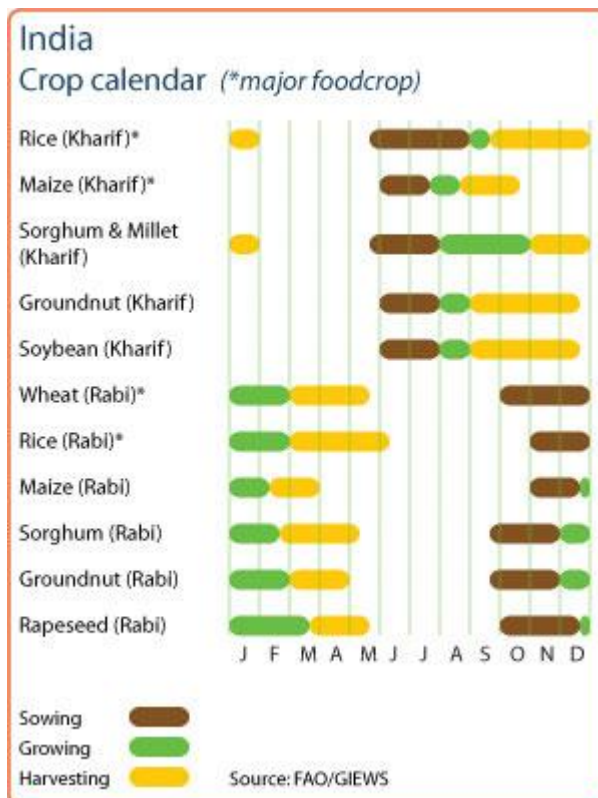
Planting of the 2014/15 main *Kharif* season crops, including rice and maize, started in late May. According to the Meteorological Department of India, the rainfall from early March to mid-April over the main cereal producing areas has been above average, facilitating land preparation. Assuming a good monsoon season and continued Government support to the rice sector, FAO tentatively forecasts the 2014 aggregate rice production at 160.5 million tonnes, up 1 percent from the 2013 record output. By contrast, early indications point to a decrease in 2014 maize production to 22.3 million tonnes, as yields are projected to return to average, after record levels in 2013.

Near-record 2013 aggregate cereal harvest estimated

Latest official forecasts for the 2013/14 secondary *Rabi* rice crop, currently being harvested, is set at 21.3 million tonnes, some 10 percent above last year's below-average crop of the same season. In addition to the 2013 main *Kharif* rice crop, harvested by January 2014, the 2013 aggregate rice production is put at a record level of 159.3 million tonnes, marginally above the bumper 2012 outcome. The 2013 maize output is officially estimated at a record level of 23.3 million tonnes. The estimated bumper aggregate cereal production in 2013 mainly reflects good monsoon rains and adequate supplies of subsidized agricultural inputs, including seeds, fertilizers and fuel.

Total cereal exports decreased in 2013/14 marketing year (April/March) but still the second highest on record

Reflecting the bumper harvest in 2013 and large carryover stocks,



India Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Rice (paddy)	150 533	159 277	160 500	1
Wheat	87 348	93 510	96 000	3
Maize	21 152	23 290	22 300	-4
Others	19 342	17 830	18 140	2
Total	278 375	293 907	296 940	1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

total cereal exports for the 2013/14 marketing year (April/March) are estimated at about 19 million tonnes, some 14 percent below the all-time highs of the previous year but still the second highest on record. The exports of wheat are estimated at near-record levels of 6 million tonnes, while those of maize are estimated to have returned to an average level of 3.4 million tonnes.

In 2014 India is expected to remain the world's major rice exporter, with shipments of 9.8 million tonnes.

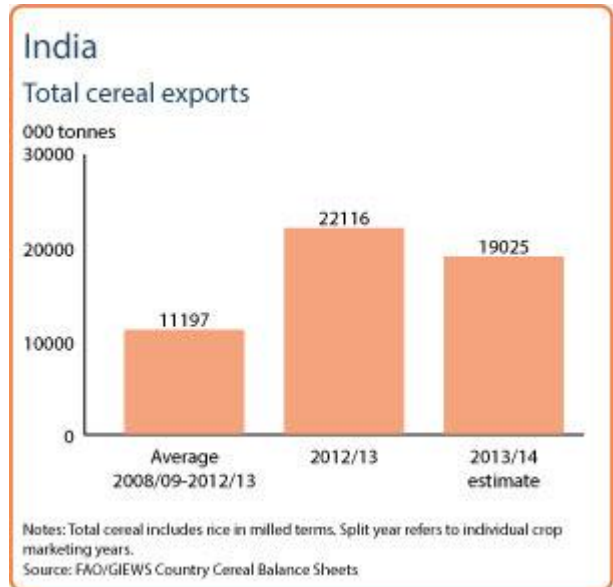
Rice and wheat prices generally stable but at high levels

The retail rice prices remained generally stable in most markets of the country in recent months, despite the pressure on the market of the ongoing 2013/14 secondary season harvest and adequate supplies from the 2013 main season crop and state reserves. Rice prices continued to be supported by sustained export demand, particularly from Western and Eastern Africa and by the ongoing Government's procurement programme for the 2013/14 marketing season which started on 1 October 2013. Similarly, wheat prices remained generally unchanged despite the estimated record output of the 2014 main *Rabi* wheat crop and ample public stocks. Prices were underpinned by a 4 percent increase in the Minimum Support Prices (MSP) for wheat during the 2014/15 marketing year and strong export demand. Overall, cereal prices in March were significantly higher than those a year earlier.

According to the Central Statistics Office the year-on-year inflation was recorded at 8.3 percent in March 2014.

Food security concerns remain for the vulnerable groups of population due to high prices

The overall food security in India is considered to be satisfactory given the recent good cereal harvest, high level of food stocks and the provision of highly subsidized rice and wheat through distribution programmes, especially for the below-poverty line families under the National Food Security Act. Under the "Food Security Bill" approved on 12 September 2013, about 75 percent of the rural and 50 percent of the urban population are entitled to receive subsidized food grains, including rice at INR 3 per kg, wheat at INR 2 per kg and coarse grains at INR 1 per kg. However, the relatively high prices of primary commodities are affecting the food security of the population with low incomes constraining their access to food.



Reference Date: 30-April-2014

FOOD SECURITY SNAPSHOT

- Record 2014 wheat production forecast
- Aggregate 2013 cereal output estimated at a near-record level
- Cereal exports decreased in 2013/14 marketing year (April/March)
- Rice and wheat prices generally stable but at high levels
- Food security concerns remain for the vulnerable groups of population due to high prices

The 2014 wheat production forecast at a record level

Harvesting of the 2014 mostly irrigated *Rabi* (winter) wheat crop began in early March and is expected to continue until late May. FAO's latest forecast puts the 2014 wheat crop at a record level of 96 million tonnes, up 3 percent from last year's bumper output. The increase is mainly attributed to a 2 percent expansion in plantings and anticipated near-record yields reflecting generally good rainfall during the growing season, as well as adequate supplies of irrigation water, fertilizers and other inputs.

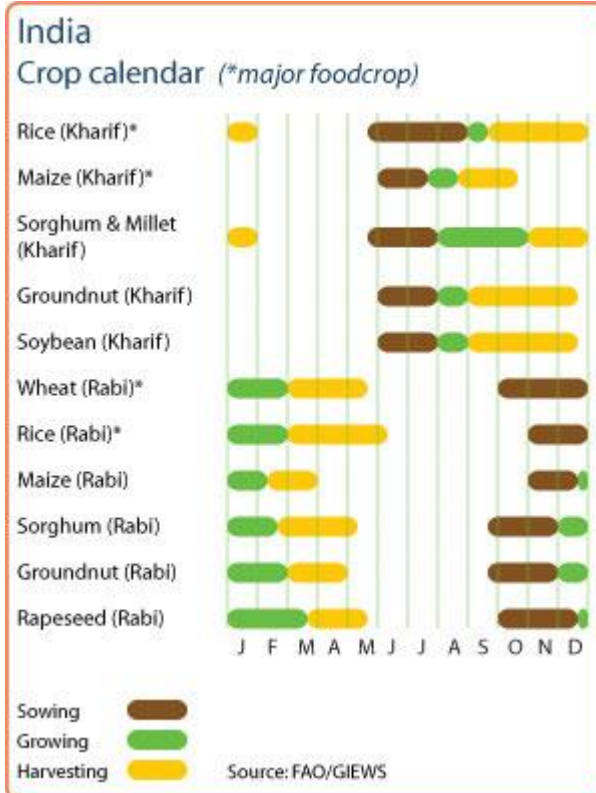
Planting of the 2014/15 main *Kharif* season crops, including rice and maize, will start in late May. According to the Meteorological Department of India, the rainfall from early March to mid-April over the main cereal producing areas has been above average, facilitating land preparation. Assuming a good monsoon season and continued Government support to the rice sector, FAO tentatively forecasts the 2014 aggregate rice production at 160.5 million tonnes, up 1 percent from the 2013 record output. By contrast, early indications point to a decrease in 2014 maize production to 22.3 million tonnes, as yields are projected to return to average, after record levels in 2013.

Near-record 2013 aggregate cereal harvest estimated

Latest official forecasts for the 2013/14 secondary *Rabi* rice crop, currently being harvested, is set at 21.3 million tonnes, some 10 percent above last year's below-average crop of the same season. In addition to the 2013 main *Kharif* rice crop, harvested by January 2014, the 2013 aggregate rice production is put at a record level of 159.3 million tonnes, marginally above the bumper 2012 outcome. The 2013 maize output is officially estimated at a record level of 23.3 million tonnes. The estimated bumper aggregate cereal production in 2013 mainly reflects good monsoon rains and adequate supplies of subsidized agricultural inputs, including seeds, fertilizers and fuel.

Total cereal exports decreased in 2013/14 marketing year (April/March) but still the second highest on record

Reflecting the bumper harvest in 2013 and large carryover stocks,



India Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Rice (paddy)	150 533	159 277	160 500	1
Wheat	87 348	93 510	96 000	3
Maize	21 152	23 290	22 300	-4
Others	19 342	17 830	18 140	2
Total	278 375	293 907	296 940	1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

total cereal exports for the 2013/14 marketing year (April/March) are estimated at about 19 million tonnes, some 14 percent below the all-time highs of the previous year but still the second highest on record. The exports of wheat are estimated at near-record levels of 6 million tonnes, while those of maize are estimated to have returned to an average level of 3.4 million tonnes.

In 2014 India is expected to remain the world's major rice exporter, with shipments of 9.8 million tonnes.

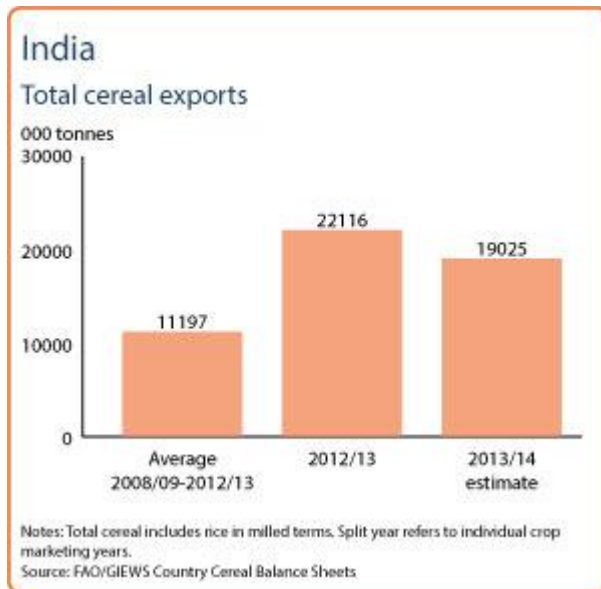
Rice and wheat prices generally stable but at high levels

The retail rice prices remained generally stable in most markets of the country in recent months, despite the pressure on the market of the ongoing 2013/14 secondary season harvest and adequate supplies from the 2013 main season crop and state reserves. Rice prices continued to be supported by sustained export demand, particularly from Western and Eastern Africa and by the ongoing Government's procurement programme for the 2013/14 marketing season which started on 1 October 2013. Similarly, wheat prices remained generally unchanged despite the estimated record output of the 2014 main *Rabi* wheat crop and ample public stocks. Prices were underpinned by a 4 percent increase in the Minimum Support Prices (MSP) for wheat during the 2014/15 marketing year and strong export demand. Overall, cereal prices in March were significantly higher than those a year earlier.

According to the Central Statistics Office the year-on-year inflation was recorded at 8.3 percent in March 2014.

Food security concerns remain for the vulnerable groups of population due to high prices

The overall food security in India is considered to be satisfactory given the recent good cereal harvest, high level of food stocks and the provision of highly subsidized rice and wheat through distribution programmes, especially for the below-poverty line families under the National Food Security Act. Under the "Food Security Bill" approved on 12 September 2013, about 75 percent of the rural and 50 percent of the urban population are entitled to receive subsidized food grains, including rice at INR 3 per kg, wheat at INR 2 per kg and coarse grains at INR 1 per kg. However, the relatively high prices of primary commodities are affecting the food security of the population with low incomes constraining their access to food.



Reference Date: 27-January-2014

FOOD SECURITY SNAPSHOT

- Favourable rains boost wheat plantings for the 2014 *Rabi* season crop
- 2013 *Kharif* season rice production to remain close to last year's bumper level
- Total cereal exports forecast to decrease in 2013/14 marketing year but remain the second highest on record
- Rice and wheat prices increased or remained generally stable
- Food security concerns remain for the vulnerable groups due to high prices

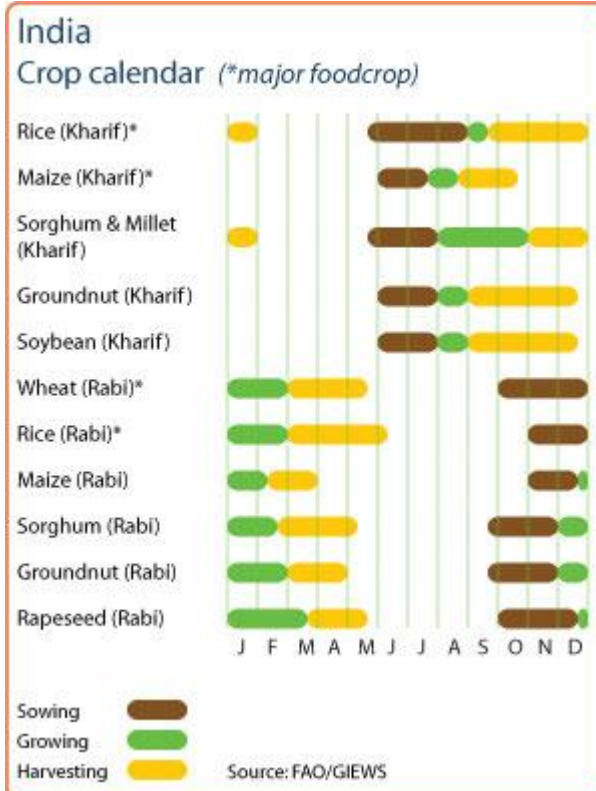
Favourable rains boost wheat plantings for the 2014 *Rabi* season crop

Planting of the 2014 *Rabi* season cereal crops, mainly wheat and rice, was completed by December. Favourable rains from September to December over much of the country, except north-western areas which experienced below-average rains, improved soil moisture allowing farmers to start planting early. However, a period of generally dry weather has prevailed since the start of January.

According to the India Meteorological Department (IMD) the cumulative rainfall for the country as a whole during the first two weeks of January has been 40 percent below the Long Period Average (LPA). However, most of the wheat and paddy is irrigated in this season and the abundant rains in the second part of the monsoon season have helped replenish water reserves for irrigation. According to information from the Ministry of Agriculture by 17 January, 31.4 million hectares were planted under wheat, 6 percent more than in the corresponding time in 2013. Early official target for the 2013/14 *Rabi* wheat crop is set at about 92.5 million tonnes, similar to last year's bumper harvest.

2013 *Kharif* season rice production to remain close to last year's bumper level

Harvesting of the 2013 *Kharif* season cereal crops, mainly maize and rice, is nearing completion. The start of the season was characterised by an early arrival and relatively good progression of the southwest monsoon over most of the country, supporting the main *Kharif* season crops plantings and benefiting early crop development. However, a succession of heavy rains resulted in localized floods from late June to August, particularly in northwest and northeast parts of the country. By contrast, rains were below average during July to August over much of eastern parts, mainly in the important rice producing states such as in Bihar, Haryana and Tamil Nadu. Latest official estimates put the 2013 *Kharif* rice production close to last year's bumper level, at 92.3 million tonnes. Despite a 2 percent increase in the area planted, yields were depressed mainly due to below average rains in July and August. FAO tentatively forecasts the 2013 aggregate rice production (in paddy terms), including the 2013 *Kharif* and the ongoing 2013/14



India
Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes			percent
Rice (paddy)	148,179	156,592	159,000	2
Wheat	84,360	94,880	92,460	-3
Maize	20,434	22,230	23,280	5
Others	19,738	19,378	17,830	-8
Total	272,710	293,080	292,570	0

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Rabi seasons, at 159 million tonnes (106 million tonnes, milled basis), some 2 percent above the 2012 near-record harvest.

The 2012/13 *Rabi* (winter) crops, wheat, barley and some paddy were harvested earlier by June 2013. The official estimate puts the 2013 winter wheat production at 92.5 million tonnes, some 3 percent below the 2012 record harvest. The decrease in production is mainly attributed to the below average rains at the start of the growing season over important producing states in the northwest and northeast of the country.

Total cereal exports forecast to decrease in 2013/14 marketing year but remain the second highest on record

With an estimated bumper harvest and large carryover stocks, the country is expected to have an exportable surplus of about 17.6 million tonnes during the 2013/14 marketing year (April/March). Reflecting an estimated reduction in 2013 wheat production compared to the record harvest in 2012 the exports of wheat are forecast at 4.5 million tonnes, some 34 percent below the 2012 record level but the second highest on record. Maize exports are forecast to decrease to 3.8 million tonnes.

India is estimated to remain the world's major rice exporter in 2013, with shipments of 9.3 million tonnes.

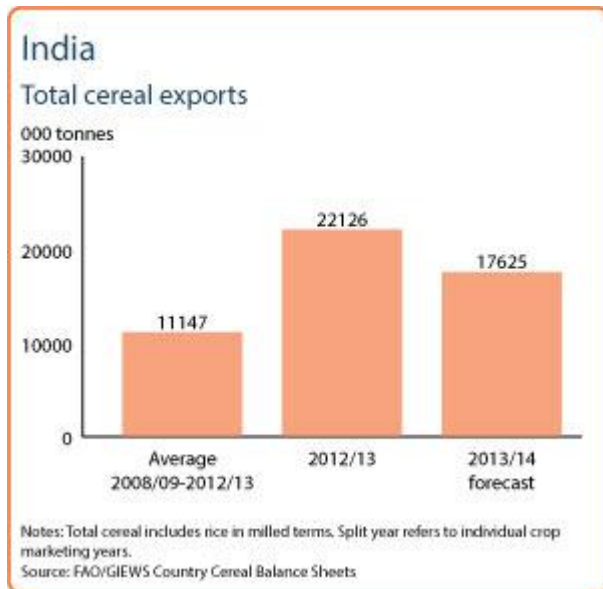
Rice and wheat prices increased or remained generally stable

The retail rice prices in January remained generally stable or increased in some markets of the country despite the 2013 main season *Kharif* harvest and ample state reserves. Prices were supported by strong export demand, particularly from Western Africa and the Middle East. The Government's ongoing procurement programme, which started on 1 October 2013 and set to acquire 34.5 million tonnes of the new crop during 2013/14 marketing year continued to underpin prices. Wheat prices remained generally stable in January in most markets of the country, despite favourable prospects for the ongoing 2013/14 *Rabi* crop, following the recent Government decision to cut the floor price for exports by 13 percent to USD 260 per tonne. The 4 percent increase in the minimum support prices (MSP) for wheat during the 2014/15 marketing year (April/March) also provided support. Overall, cereal prices in January were significantly higher than those a year earlier.

According to the Central Statistics Office the year-on-year inflation was recorded at 9.9 percent in December 2013.

Food security concerns remain for the vulnerable groups due to high prices

The overall food security in India is considered to be satisfactory given the ample supplies of cereals, high level of food stocks and the provision of highly subsidised rice or wheat distribution programme especially for the below-poverty line families under the National Food Security Act. Under the new "Food Security Bill", approved on 12 September 2013, about 75 percent of rural and 50 percent of urban population will receive highly subsidized food grains with rice at INR 3 per kg, wheat at INR 2 per kg and coarse grains at INR 1 per kg. The entitlement for the poorest of the poor households would continue to be 35 kg of grain per household per



month. Poor family children between six months and 14 years of age will be entitled to a free lunch or a take home ration of food. In addition to the free meals, pregnant women and lactating mothers will receive at least INR 6 000. At the moment, high prices of primary commodities and high consumer price inflation are affecting food security of population with low incomes and inadequate access to food. Furthermore, the floods between June and August over the northern parts damaged housing, agricultural infrastructure, water sanitation facilities. The affected population suffered loss of assets including houses, grain stocks and livestock.

Reference Date: 02-October-2013

FOOD SECURITY SNAPSHOT

- 2013 *Kharif* season rice production to remain close to last year's bumper level
- Total cereal exports forecast to decrease in 2013/14 marketing year but to remain the second highest on record
- Wheat and rice prices generally stable
- Food security concerns remain for the vulnerable groups due to high prices

2013 *Kharif* season rice production to remain close to last year's bumper level

Harvesting of the 2013 *Kharif* season cereal crops, mainly maize and rice, is currently underway. The start of the season was characterised by an early arrival and relatively good progression of the southwest monsoon over most of the country, supporting the main *Kharif* season crops plantings and benefiting early crop development. However, a succession of heavy rains resulted in localized floods from late June to August, particularly in northwest and northeast parts of the country. By contrast, rains were below average during July to August over much of eastern parts, mainly in the important rice producing states such as in Bihar, Haryana and Tamil Nadu. According to information from the Ministry of Agriculture by 6 September, 36.6 million hectares were reported under paddy, 4 percent more than in the corresponding time in 2012. However, despite the increase in the area planted, yields were depressed mainly due to below average rains in July and August. As a result, the 2013 *Kharif* rice production is officially forecast close to last year's bumper level, at 92.3 million tonnes.

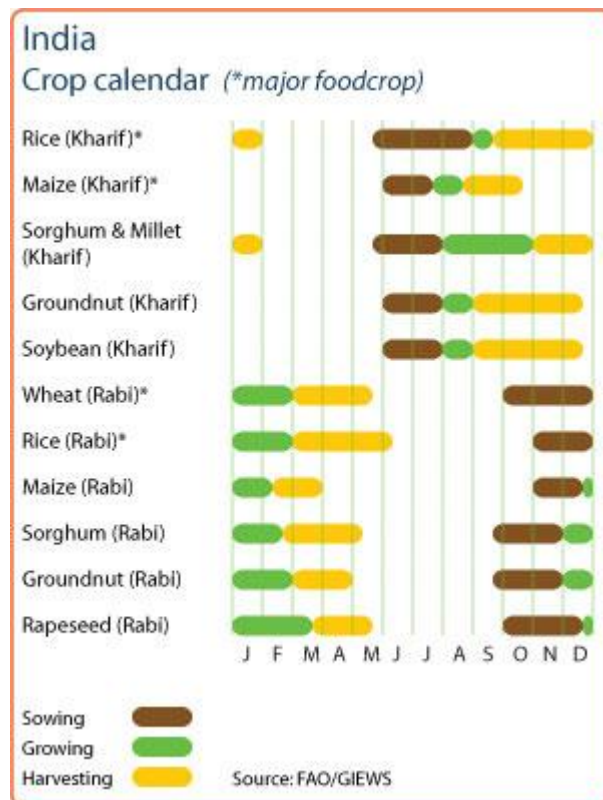
FAO tentatively forecasts the 2013 aggregate rice production (in paddy terms), including the ongoing *Kharif* and the 2013/14 *Rabi* seasons, at 162 million tonnes (108 million tonnes, milled basis), some 3 percent above the 2012 near record harvest.

The 2012/13 *Rabi* (winter) crops, wheat, barley and some paddy were harvested earlier by June. The official estimate puts the 2013 winter wheat production at 92.5 million tonnes, some 3 percent below the 2012 record harvest but still the second best crop on record. The decrease in production is mainly attributed to the below average rains at the start of the growing season over important producing states in the northwest and northeast of the country.

Near record 2012 paddy harvest estimated

According to the "Fourth Advance Estimate" from the Ministry of Agriculture the 2012 total rice production (in paddy terms), including 2012 *Kharif* and 2012/13 *Rabi* seasons, is estimated at 156.6 million tonnes (104.4 million tonnes, milled basis), similar to the 2011 record harvest. Overall, the cereal output for 2012 is estimated at 293.1 million tonnes, 2 percent above the previous year.

Total cereal exports forecast to decrease in 2013/14 marketing year but remain the second highest on record



India Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes			percent
Rice (paddy)	148,179	156,592	161,992	3
Wheat	84,360	94,880	92,460	-3
Maize	20,434	22,230	23,280	5
Others	19,738	19,378	17,830	-8
Total	272,710	293,080	295,562	1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

With an estimated bumper harvest and large carryover stocks, the country is expected to have an exportable surplus of about 19 million tonnes during the 2013/14 marketing year (April/March). Reflecting an estimated reduction in 2013/14 wheat harvest, the exports of wheat are forecast at 5.5 million tonnes, some 19 percent below the 2012 record level but the second highest on record. Maize exports are forecast to decrease slightly to 4 million tonnes.

Similar to 2012, India is expected to remain the world's major rice exporter in 2013, with shipments of 9.5 million tonnes.

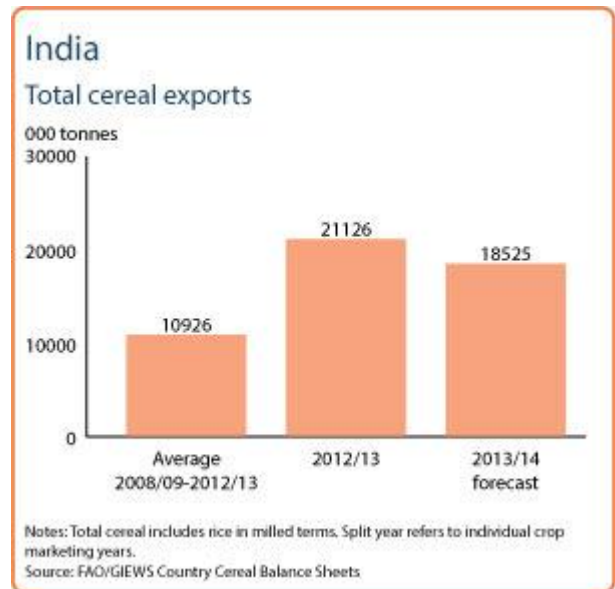
Wheat and rice prices generally stable

Retail rice prices in September remained stable, despite increases in some markets, and were generally above their levels a year ago. Downward pressure on prices from the ongoing harvest of the 2013 main season *Kharif* crop was partially offset by lower than previously expected production. The Government procurement programme, to start on 1 October, set to acquire 34.5 million tonnes of the new crop during 2013/14 marketing year also provide price support. Prices of wheat remained virtually unchanged in most markets reflecting ample domestic availabilities from the 2013 near-record crop, harvested earlier in the year. The price of onions, one of the most consumed vegetables, continued to strengthen in September, reaching record levels in most monitored markets. The high prices mainly reflect reduced domestic availability, following heavy rains in June 2013 and last year's drought in key-producing areas. Onions prices in the Chennai market in September 2013 were about 325 percent above their levels of the same month a year earlier.

According to the Central Statistics Office the year-on-year inflation was recorded at 9.5 percent in August 2013.

Food security concerns remain for the vulnerable groups due to high prices

The overall food security in India is considered to be satisfactory given the ample supplies of cereals, high level of food stocks and the provision of highly subsidised rice or wheat distribution programme especially for the below-poverty line families under the National Food Security Act. Under the new "Food Security Bill", approved in early July, up to 67 percent of the population or some 800 million people will receive highly subsidized food grains with rice at INR 3 per kg, wheat at INR 2 per kg and coarse grains at INR 1 per kg. The entitlement for the poorest of the poor households would continue to be 35 kg of grain per household per month. Poor family children between six months and 14 years of age will be entitled to a free lunch or a take home ration of food. In addition to the free meals, pregnant women and lactating mothers will receive at least INR 6000. At the moment, high prices of primary commodities and high consumer price inflation are affecting food security of population with low incomes and inadequate access to food. Furthermore, the floods between June and August over the northern parts damaged housing, agricultural infrastructure, water sanitation facilities. The affected population suffered loss of assets including houses, grain stocks and livestock.



India

Retail wheat prices in major cities

Indian Rupee per Kg



Source: Ministry of Consumer Affairs

Reference Date: 17-December-2012

FOOD SECURITY SNAPSHOT

- Start of 2012/13 *Rabi* season characterised by mixed rains
- Late onset of the monsoon and a prolonged dry spell reduce 2012 *Kharif* rice harvest
- Rice prices followed mixed trend while wheat prices continue to gain strength
- Food security concerns remain for the vulnerable groups due to high prices

Start of 2012/13 *Rabi* season characterised by mixed rains

Planting of the 2012/13 *Rabi* season cereal crops, mainly wheat and rice, is almost completed. According to the India Meteorological Department (IMD) the cumulative post-monsoon rainfall for the country as a whole between 1 October and 28 November has been 19 percent below the Long Period Average (LPA). Important producing states such as Uttar Pradesh, Punjab and Haryana in the north-west, Bihar and West Bengal in the north-east and Karnataka in the south all receive deficient to scanty rains, while normal to above normal rains have been recorded over eastern producing areas. However, most of the wheat and paddy is irrigated in this season and the abundant rains in the second part of the monsoon season have helped to replenish water reserves for irrigation and improve soil moisture conditions.

Early official forecast for the 2012/13 *Rabi* wheat crop is set at a near average level of about 86 million tonnes while *Rabi* paddy crop is set to reach record levels at about 21 million tonnes.

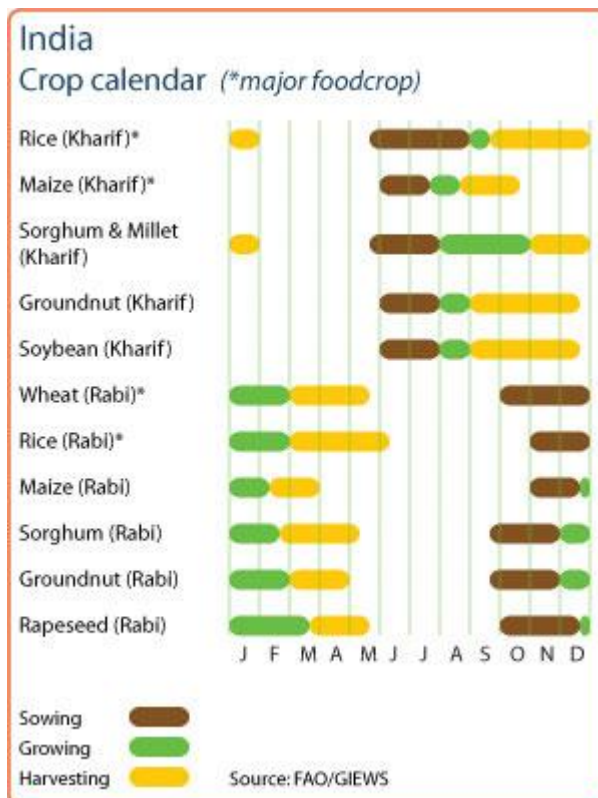
Late onset of the monsoon and a prolonged dry spell reduce 2012 *Kharif* rice harvest

Harvesting of the 2012 main season *Kharif* crops, including rice and coarse grains, is nearly completed. Reflecting a late onset of the monsoon and a prolonged dry spell in June and July in parts of the country, the "First Advance Estimates" from the Ministry of Agriculture point to a *Kharif* rice harvest of 128.4 million tonnes (85.6 million tonnes, milled basis), about 6 percent less than the record harvest in 2011, but still some 3 percent higher than the previous five-year average of the same season.

Based on the official forecast, the 2012 total rice production (in paddy terms), including *Kharif* and ongoing *Rabi* seasons, would be 150 million tonnes (100 million tonnes, milled basis), a drop of 4 percent from the 2011 record harvest, but still the second best performance on record. In aggregate, cereal production in 2012 is estimated at 281.7 million tonnes, 1 percent below the previous year's record output.

The provision of seeds and other inputs through the government's Subsidy Schemes, helped to mitigate the effects of the poor rainfall.

During the 2012/13 marketing year (April/March) the country is expected to have an exportable surplus of about 15.7 million tonnes



India Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes			percent
Rice (paddy)	145 571	156 470	149 993	-4
Wheat	80 546	86 870	93 900	8
Maize	19 741	21 570	20 340	-6
Others	20 208	20 490	17 430	-15
Total	266 066	285 400	281 663	-1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

(comprising rice about 7.7 million, wheat about 5 million and maize about 3 million tonnes), more than double the average amount of the previous five years. In 2012, India is expected to surpass Thailand as the world's major rice exporter, with shipments of over 9 million tonnes. However, forecast for 2013 indicates a smaller amount, below that of Thailand.

Rice prices followed mixed trend while wheat prices continue to gain strength

The retail rice prices, in nominal terms, remained generally stable in the main markets of the country, following the ongoing *Kharif* main season harvest and the release of 500 000 tonnes of government stocks through Open Market sales (OMS) in mid-November. However, they increased considerably in Chennai market, due to a sluggish inflow of rice in the state, from the neighbouring states Andhra Pradesh and Karnataka. In November 2012, they reached a new record level averaging INR 31 (about USD 0.57) per kg, some 36.7 percent higher than a year earlier.

Wheat prices have been increasing since May 2012, reaching record levels in most markets in November, particularly in Chennai where they rose by 30.2 percent compared to the last year. The increase is mainly attributed to strong export demand and tight supplies in the local markets. The release of 500 000 tonnes from government stocks by mid-November mitigated the increase in wheat prices somewhat in some markets. Overall, in November cereal prices were above their levels a year earlier supported by high minimum support prices in agricultural season 2011/12 and high procurement volumes by the Government, which currently holds large volumes of stocks.

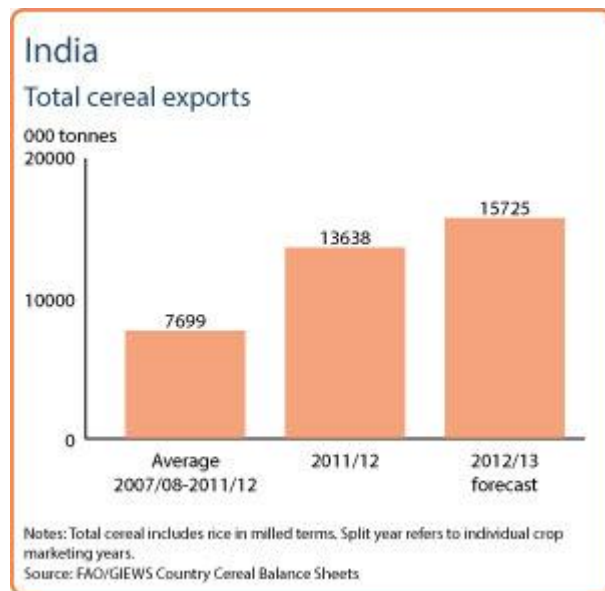
According to the Central Statistics Office the year-on-year inflation was recorded at 9.9 percent in November 2012.

Food security concerns remain for the vulnerable groups due to high prices

The overall food security in India is considered to be satisfactory given the ample supplies of cereals, high level of food stocks and the provision of highly subsidised rice or wheat distribution programme especially for the below-poverty line families under the National Food Security Act.

Currently, the entitlement under this programme is 25 kg of rice or wheat per month per family at INR 3 per kg. A new bill is currently proposed to provide cheap grains to about two-thirds of poor families with uniform 25 kg of grains (5 kg per person per month). Rice will cost INR 3 per kg, wheat at 2 INR per kg and coarse grains at INR 1 per kg.

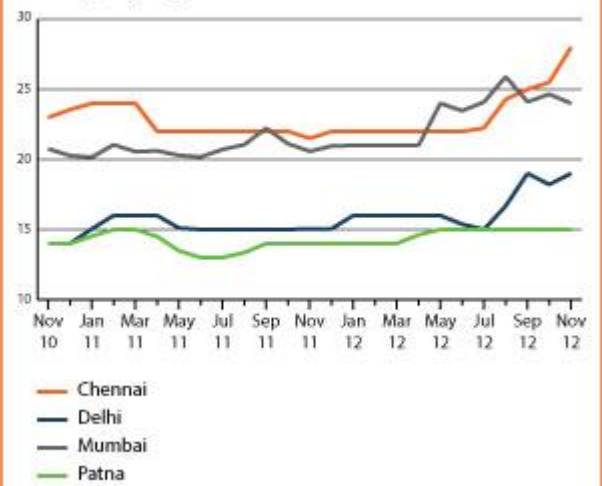
However, high prices of primary commodities and high consumer price inflation are affecting food security of population with low incomes and inadequate access to food.



India

Retail wheat prices in major cities

Indian Rupee per Kg



Source: Ministry of Consumer Affairs

Reference Date: 27-June-2012

FOOD SECURITY SNAPSHOT

- Record 2012 *Rabi* wheat and rice production estimated
- Final estimate of 2011 aggregate cereal production shows record output
- Rice price stable or rising while wheat prices generally stable
- Food security concerns remain for the vulnerable groups

Record wheat and rice harvests of the 2011/12 *Rabi* season

Harvesting of the 2012 *Rabi* season wheat and rice crops is virtually completed, and the Third Advance Estimate by the Ministry of Agriculture projects a bumper production of 90.2 million tonnes of wheat and 13.5 million tonnes of milled rice. The bountiful harvest can be attributed to the favourable weather and good availability of irrigation water, fertilizers and other inputs as well as high government procurement prices.

Following these good harvests, the Government procurement of wheat and rice, as of early June this year, has been significantly higher than the corresponding period last year.

The planting of the monsoon season (*Kharif*) crops, mainly rice and coarse grains, is beginning slowly because of the scanty rains so far. According to the India Meteorological Department (IMD) the cumulative seasonal rainfall for the country as a whole during this year's monsoon since 1 June has so far been 42 percent below the Long Period Average. The IMD long range forecast points to a normal rainfall during the 2012 monsoon season (June to September).

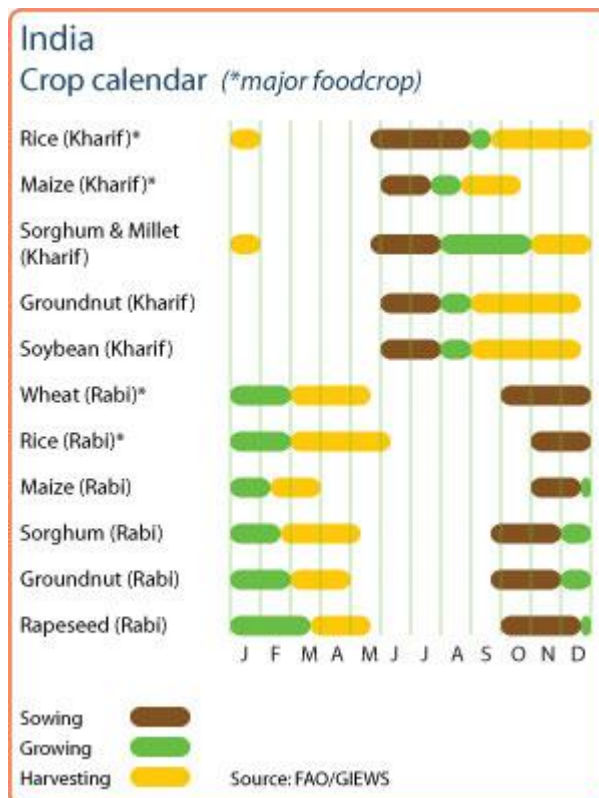
Final estimate of 2011 cereal production shows record output

Reflecting favourable monsoon rains, the final official estimate of 2011 aggregate cereal production indicates a record level of 232.1 million tonnes including milled rice, an increase of 5.5 percent over the previous year's record harvest. Significant gains were made both in wheat and rice crops.

During the marketing year 2012/13 (Apr/Mar) the country is expected to have an exportable surplus of about 13 million tonnes, comprising of rice, wheat and maize, nearly double the average of the previous five years. With high government procurement, lack of sufficient quality storage capacity is a primary concern.

Rice prices stable or rising and wheat prices generally stable

The domestic prices, in nominal terms, of rice over last few months have remained stable in some markets and have risen in others. Wheat prices, however, have been steady across the country. The overall annual rate of inflation, based on the year-on-year change in the wholesale price index of primary articles, in May 2012 was 10.9 percent, while the inflation rate for food grains (cereals and pulses) in May was 7.8 percent. Thus, the food prices in real terms have



India
Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes			percent
Rice (paddy)	145 301	155 107	156 000	1
Wheat	80 546	86 870	90 230	4
Maize	19 693	21 330	20 600	-3
Others	20 218	20 540	21 070	3
Total	265 758	283 847	287 900	1

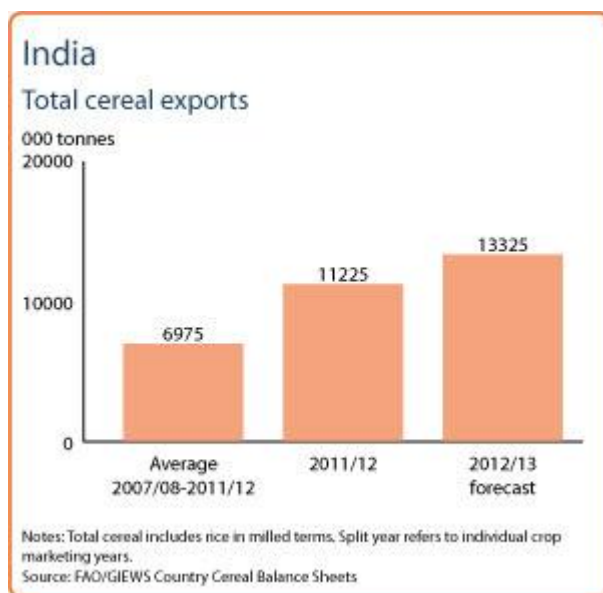
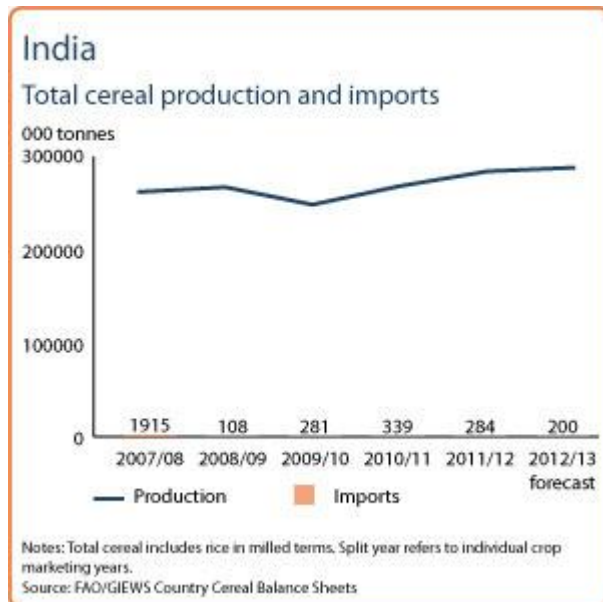
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

declined in recent months. The downward pressure on grain prices due to ample supplies from a record cereal harvest this year is to some extent offset by increased export demand.

Food security concerns remain for the vulnerable groups

With the ample supplies and the easing of food prices, food security in general is improving. However, high prices of primary commodities and high consumer price inflation are affecting food security of population with low incomes and inadequate access to food.

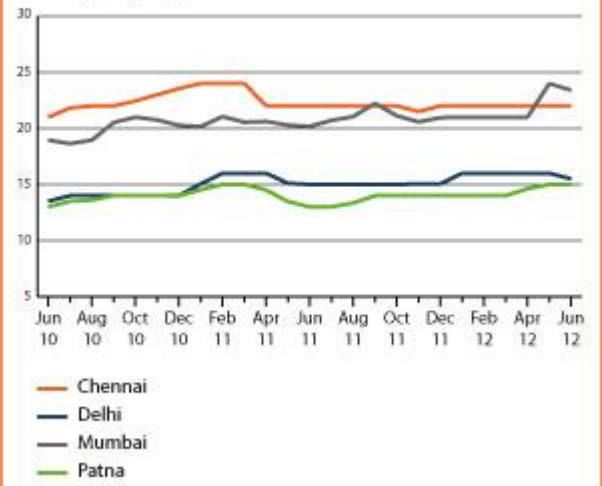
Among other policy measures, under the National Food Security Act, the distribution of rice or wheat is highly subsidized, especially for the below-poverty line families. The entitlement under this programme is 25 kg of rice or wheat per month per family at INR 3 per kg. A bill is currently proposed to provide cheap grains to 810 million people by widening subsidies to 75 percent of the rural population and half the urban population with higher and cheaper allocations for the poorest.



India

Retail wheat prices in major cities

Indian Rupee per Kg



Source: Ministry of Consumer Affairs

Reference Date: 14-February-2012

FOOD SECURITY SNAPSHOT

- Uneven distribution of rains characterise the beginning of the 2011/12 *Rabi* season
- Following favourable weather the harvest of the current *Kharif* season rice (in milled form) is estimated at a record level of 87 million tonnes
- Rice and wheat prices generally stable
- Food security concerns remain for the vulnerable groups

Uneven distribution of rains characterise the beginning of the 2011/12 *Rabi* season

Currently, the 2012 main *Rabi* wheat and rice crops, sown from last October onwards, are in growing conditions. The planting of paddy will continue until end of February. Following normal rains at the start of the 2011/12 cropping season, a period of generally dry weather prevailed in January. However, most of the wheat and paddy is irrigated in this season.

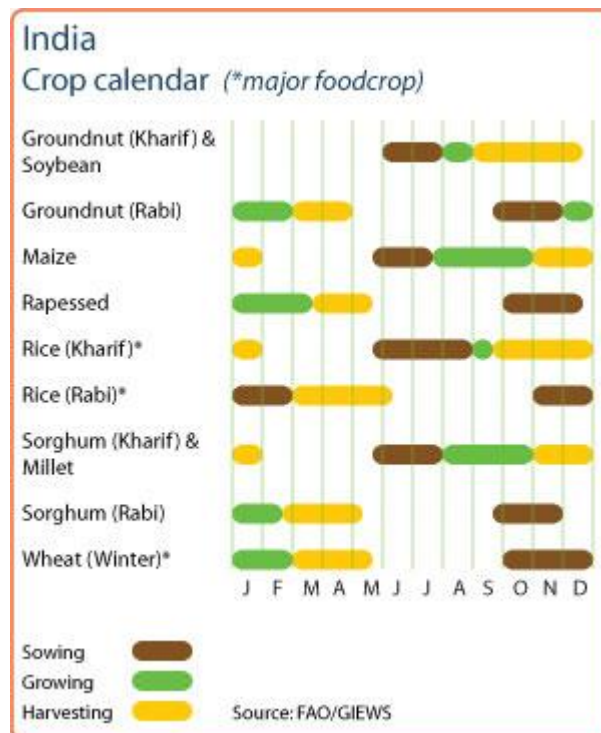
Following favourable weather the harvest of the 2011 *Kharif* season rice is estimated at a record level of 87 million tonnes

Reflecting favourable monsoon rains and increase in paddy plantings, the first official estimate of the 2011 *Kharif* rice harvest is set at 130.6 million tonnes (in paddy terms), some 8 percent higher than the poor harvest of the same season a year before. The *Kharif* season paddy crop in India accounts for about 85 percent of the annual production. The FAO estimate of 2011 aggregate rice production is set at a bumper level of 154.5 million tonnes (or 103 million tonnes of milled rice), showing an increase of about 8 percent from the previous year's above-average output. Thus, the 2011 total cereal production, including rice in paddy terms, is estimated to reach a record level of 282 million tonnes, 6 percent over the previous year's good harvest.

In September of this year, the ban on rice exports was partly lifted with an initial shipment of 2 million tonnes of the privately owned rice stock. During 2012 the country is expected to export about 5 million tonnes of rice, some 1.5 million tonnes more than the estimated exports in 2011. Cereal exports, mainly rice, maize, and wheat, during the 2010/11 marketing year (Apr/Mar) estimated at about 6.1 million tonnes, show an increase of about 44 percent over the previous year. The total cereal exports for the 2011/12 marketing year are forecast to reach a record level at 9.6 million tonnes or 57 percent higher than a year earlier.

Rice and wheat prices generally stable

The domestic prices of rice and wheat over last few months have remained stable in most markets, although the prices of rice were generally higher than the same period last year. Price for rice in Patna market, for example, has been stable at a record level since September 2011 averaging INR 25 (about USD 0.5) per kg. In January 2012 it was some 14 percent higher than a year earlier.



India
Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Rice (paddy)	142 085	142 973	154 492	8
Wheat	77 042	80 800	85 930	6
Maize	18 356	21 280	21 500	1
Others	19 668	20 720	19 940	-4
Total	257 152	265 773	281 862	6

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Wheat prices, on the other hand, were also relatively stable but lower than their respective levels a year before.

In January 2012, price of wheat in Delhi market increased by 6.3 percent compared to December 2011. However, it was 5 percent below its level a year earlier.

The downward pressure on grain prices due to ample supplies from a record cereal harvest this year was to some extent offset by increased export demand.

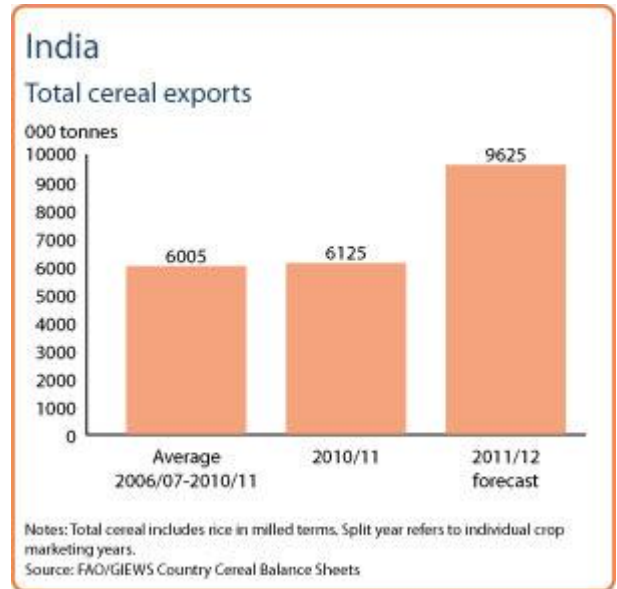
The latest available official data indicate that the year-on-year general inflation (based on the wholesale price index for primary articles) decreased to 6.5 percent in December 2011 from 9.3 percent in November 2011. Food inflation decreased to 1.97 percent in December 2011 from 7.61 percent a month earlier.

Food security concerns remain for the vulnerable groups

With the ample supplies and the easing of food prices, food security in general has improved. However, high prices of primary commodities and high consumer price inflation are affecting food security of population with low incomes and inadequate access to food.

The government plans to enhance the food security situation by preserving rice supplies. Rice supplies will be released for export once there is marked improvement in the domestic market situation and domestic food inflation. In addition, the duty-free imports policy for rice, wheat, pulses, edible oils, and raw sugar has been extended.

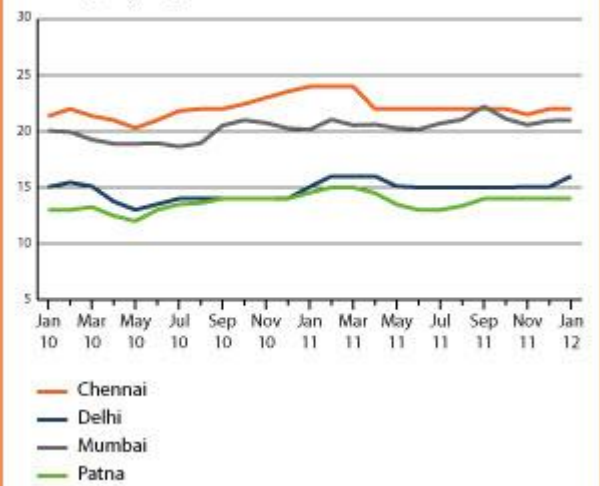
Among other policy measures, under the National Food Security Act, the distribution of rice or wheat is highly subsidized, especially for the below-poverty line families. The entitlement under this programme is 25 kg of rice or wheat per month per family at INR 3 per kg. Similarly, under the public welfare scheme, the government will allocate 5 million tonnes of subsidized rice and wheat to the families below poverty line until March 2012.



India

Retail wheat prices in major cities

Indian Rupee per Kg



Source: Ministry of Consumer Affairs

Reference Date: 23-May-2011

FOOD SECURITY SNAPSHOT

- Harvest of the current *Rabi* season wheat is forecast at a record level of 84.3 million tonnes
- Wheat prices have come down and rice prices are stabilized in recent months in most markets
- Inflation has come down in May but still remains in double digits and is a cause for concern for food security of the low income population

A bumper harvest of the current *Rabi* season wheat is forecast

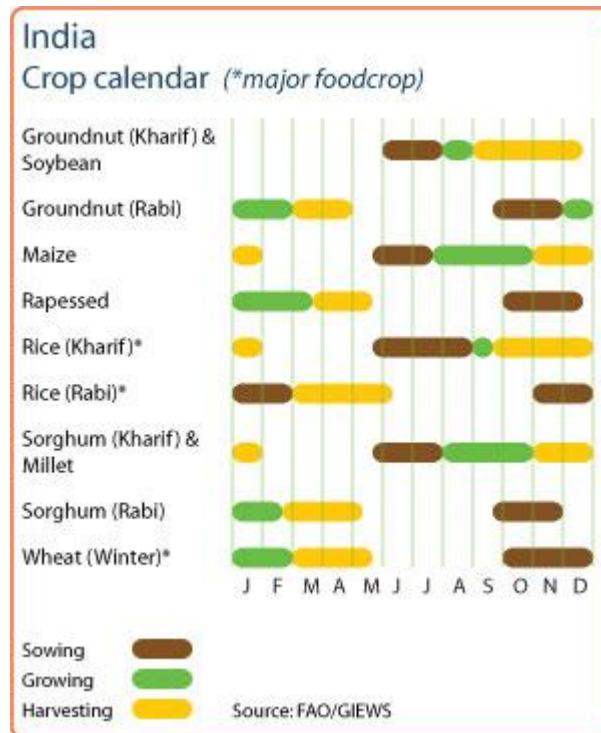
Harvesting of *Rabi* (winter) crops, such as wheat, barley and some paddy which began in southern states and progressively moving northwards, is nearly completed. The third official estimate of 2011 wheat harvest is put at a bumper level of 84.27 million tonnes, about four percent above the last year's previous record production. Despite of dry spells in West Bengal and Bihar states in the east and cyclones/floods in other parts, overall favourable weather and rising commodity prices are seen responsible for the good output. At the beginning of the season the Government increased the minimum support price for this year's wheat by 11 percent over the level of the previous marketing year (April/March.). Total harvest of the secondary season *Rabi* paddy is estimated at 14.5 million tonnes, showing a slight increase over the previous year's good crop.

The final estimate of the total cereal production for 2010 is estimated at 215 million tonnes (including milled rice) or 262 million tonnes including paddy, showing a significant recovery of about 6 percent from the drought affected 2009 but just shy of the record output of the preceding year.

Reportedly the current wheat stocks are in the order of 19 million tonnes, far greater than the official target level of 8.2 million tonnes. The ban on rice and wheat exports was partially lifted by allowing export of 300 000 tonnes of non basmati rice and of 200 000 tonnes of wheat to Bangladesh and additional quantities to Nepal. Cereal exports, mainly rice, maize, and wheat, during 2010/11 marketing year are estimated at about 3.6 million tonnes showing slight increase over the previous year. Owing to the good levels of stocks and the estimated bumper wheat harvest of 2011, total cereal exports comprising mainly of rice, maize and wheat, for the current marketing year 2011/12 are estimated at 6.6 million tonnes, returning to more normal levels of 2007/08 and before.

Current wheat prices have come down and rice prices stabilized but they remain generally higher than the same period a year ago

The year-on-year general inflation (based on the wholesale price index for primary articles) in the first week of May 2011 was estimated at 10.94 percent down from over 13 percent in early march. By contrast, rice and wheat price inflation was measured at 2.12 and 5.2 percent respectively as an average over the previous 52 weeks. However, the



India Cereal production

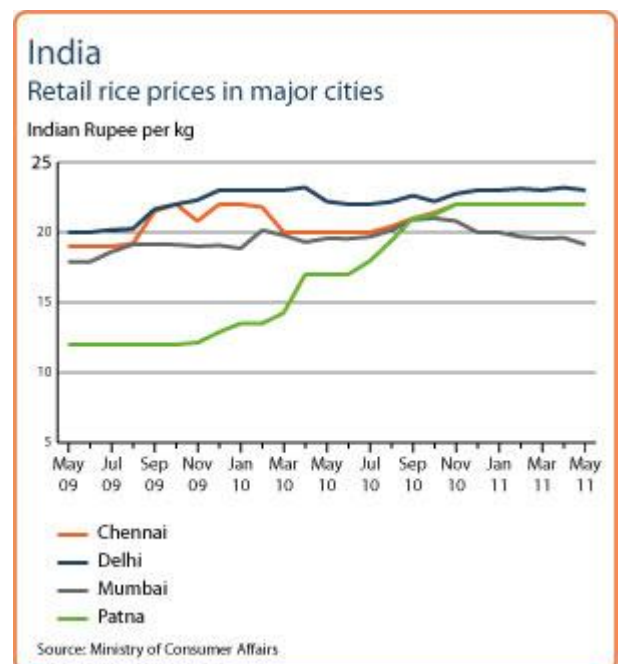
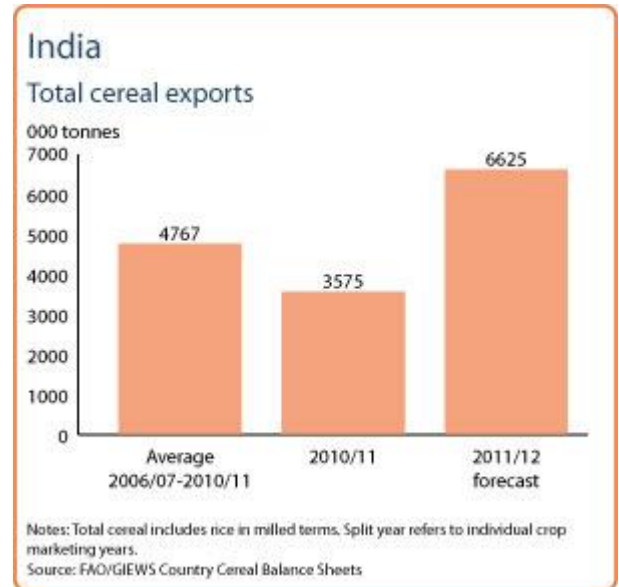
	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Rice (paddy)	141 722	141 158	150 000	6
Wheat	77 042	80 800	84 270	4
Maize	18 146	20 230	20 600	2
Others	18 136	18 500	19 300	4
Total	256 405	262 038	275 650	5

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

general inflationary tendency continues in the economy.

Food security is affected by high food prices

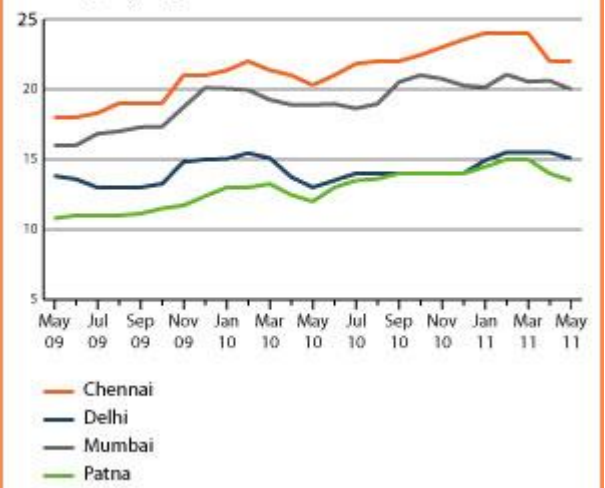
Although staple cereal prices have seen some relief in last two months increasing prices of general consumer products and basic food commodities is affecting food security of population with low incomes and inadequate access to food. Among other policy measures, the provision of highly subsidised rice or wheat distribution programme especially for the below-poverty line families under the National Food Security Act has been scaled up. The entitlement under this programme is 25 kg of rice or wheat per month per family at INR 3 per kg. Duty-free imports policy of for rice, wheat, pulses, edible oils, and raw sugar has been extended.



India

Retail wheat prices in major cities

Indian Rupee per kg



Source: Ministry of Consumer Affairs

Reference Date: 4-April-2011

FOOD SECURITY SNAPSHOT

- Harvest of the current *Rabi* season wheat is forecast at a record level of 81.5 million tonnes.
- Prices of the staple food grains, rice and wheat, have stabilized in recent months.
- High inflation (in excess of 13 percent) of primary products is a cause for concern for food security of the low income population.

A bumper harvest of the current *Rabi* season wheat is forecast

Harvesting of *Rabi* (winter) crops, such as wheat, barley and some paddy has begun in southern states and will progressively move northwards. The official forecast of 2011 wheat harvest is put at a bumper level of 81.47 million tonnes, about one percent above the last year's previous record production. Despite of dry spells in West Bengal and Bihar states in the east and cyclones/floods in other parts, overall favourable weather and rising commodity prices are seen responsible for the good harvest. At the beginning of the season the Government increased the minimum support price for this year's wheat by 11 percent over the level of the previous marketing year (April/March.).

The final estimate of the total cereal production for 2010 is estimated at 216.8 million tonnes (including milled rice), showing a significant recovery of 6.5 percent from the drought affected 2009 but just shy of the record output of the preceding year.

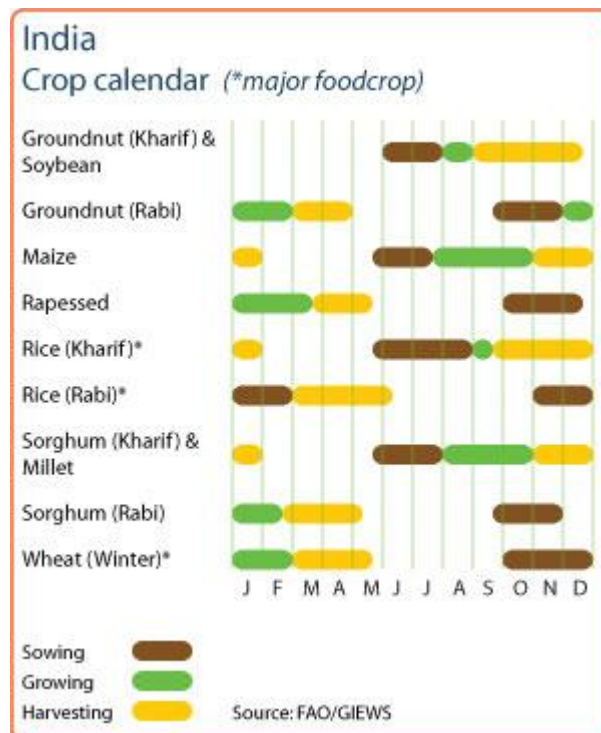
Reportedly the current wheat stocks are in the order of 19 million tonnes, far greater than the official target level of 8.2 million tonnes. The ban on rice and wheat exports was partially lifted by allowing export of 300 000 tonnes of non basmati rice and of 200 000 tonnes of wheat to Bangladesh and additional quantities to Nepal. Cereal exports, mainly rice, maize, and wheat, during 2010/11 marketing year are estimated at about 3.8 million tonnes showing slight increase over the previous year.

Current prices of rice and wheat generally higher than the same period a year ago

The year-on-year general inflation (based on the wholesale price index for primary articles) in second week of March 2011 was estimated at 13.5 percent. By contrast, rice and wheat price inflation was measured at 5.9 and 3.4 percent respectively as an average over the previous 52 weeks. With the expectations of a bumper harvest and a release of significant amount of grains from the government stocks prices are stabilizing, however the general inflationary tendency continues in the economy.

Food security is affected by high food prices

Increasing prices of general consumer products and basic food commodities is affecting food security of population with low incomes and inadequate access to food. Among other policy measures, the provision of highly subsidised rice or wheat distribution programme

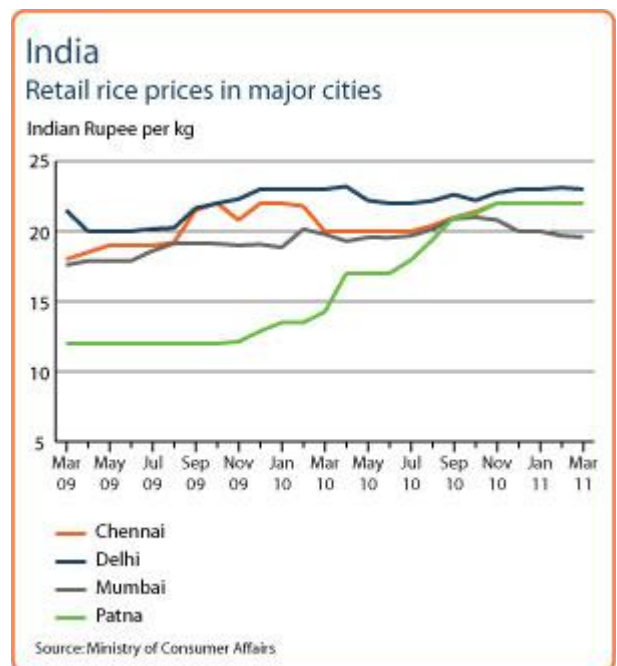
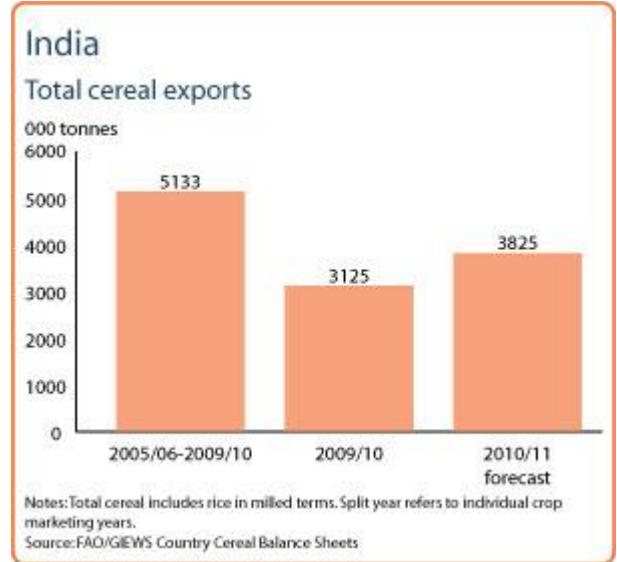


India Cereal production

	2005-2009 average	2009	2010 estimate	change 2010/2009
	000 tonnes			percent
Rice (paddy)	141026	133643	144293	8
Wheat	74610	80680	80800	0
Maize	17043	16720	20030	20
Others	19415	17170	19800	15
Total	252094	248213	264923	7

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

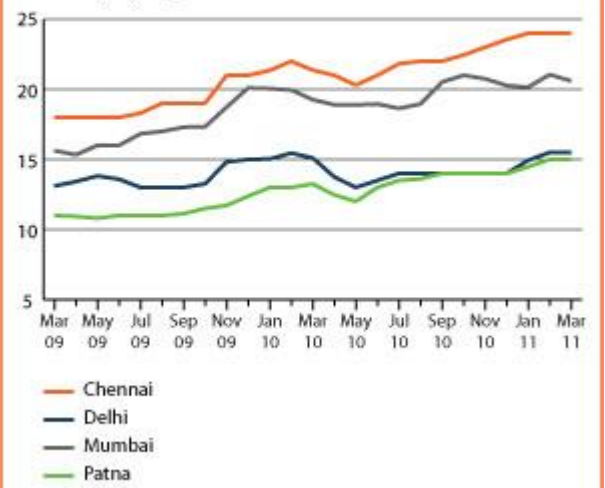
especially for the below-poverty line families under the National Food Security Act has been scaled up. The entitlement under this programme is 25 kg of rice or wheat per month per family at INR 3 per kg. Duty-free imports policy of for rice, wheat, pulses, edible oils, and raw sugar has been extended.



India

Retail wheat prices in major cities

Indian Rupee per kg



Source: Ministry of Consumer Affairs

Reference Date: 2-September-2010

FOOD SECURITY SNAPSHOT

- The current main season *Kharif* crops are growing under normal conditions and a recovery over the drought-affected 2009 is expected.
- Prices of the staple food grains, rice and wheat, are stabilizing at high levels.
- High food and other primary products prices are a cause for concern as food security of low income population is affected negatively.

Current *Kharif* season underway with generally favourable rainfall conditions

Except for a few states in northeast and the centre there has been normal to above normal rains in most parts of the country. The cumulative monsoon rains from the beginning of June to 18th August for the country as whole have been about 5 percent below the long term average. At this early stage, crop growth and overall prospects are considered favourable and a recovery from the drought-affected 2009 is expected. A reduction of 15.5 percent or about 18 million tonnes of food grains was estimated during 2009 as compared to 2008.

Rabi (winter) crops, such as wheat, barley and some paddy were harvested by June. The official estimate of 2010 winter wheat harvest shows about the same level of production as the record harvest of 2009. The Government has increased the minimum support price for this year's wheat by 11 percent over the level of the previous marketing year (Apr./Mar.).

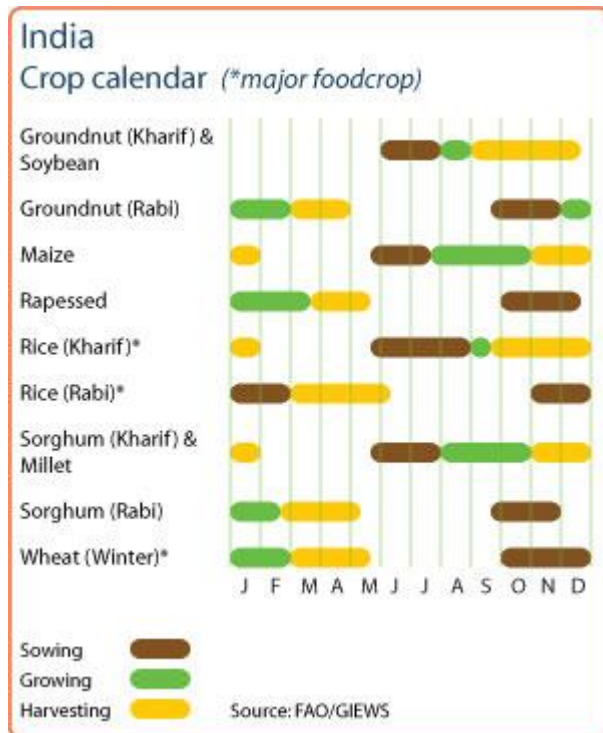
The ban on rice and wheat exports has been partially lifted by allowing export of 300 000 tonnes of non basmati rice and of 200 000 tonnes of wheat to Bangladesh and additional quantities to Nepal. Grain exports during 2010/11 marketing year are expected to increase over the previous year.

Current prices of rice and wheat generally higher than the same period a year ago

The year-on-year general inflation (based on the wholesale price index for all articles) in second week of August 2010 was estimated at 10.05 percent. Rice and wheat price inflation was measured at 7.72 and 7.61 percent respectively over the same week a year ago. With a release of significant amount of grains from the government stocks prices are stabilizing, however the general inflationary tendency continues in the economy.

Food security is affected by high food prices

Increasing prices of basic food commodities is affecting food security of population with low incomes and inadequate access to food. Basic cereal price inflation, however, is more-or-less equal to the general inflation. Among other policy measures, the provision of highly subsidised rice or wheat distribution programme especially for the below-poverty line families under the National Food Security Act has been scaled up. The entitlement under this programme is 25 kg of rice

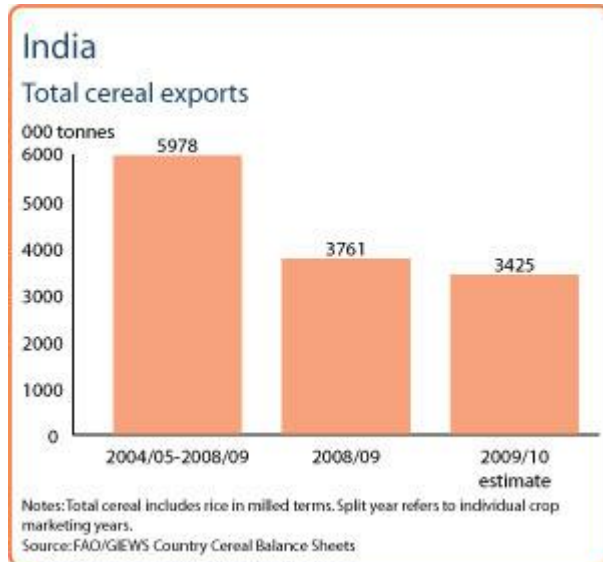


India Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Rice (paddy)	141035	133688	150442	13
Wheat	74610	80680	80710	0
Maize	17035	16680	18500	11
Others	19477	17480	19105	9
Total	252157	248528	268757	8

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

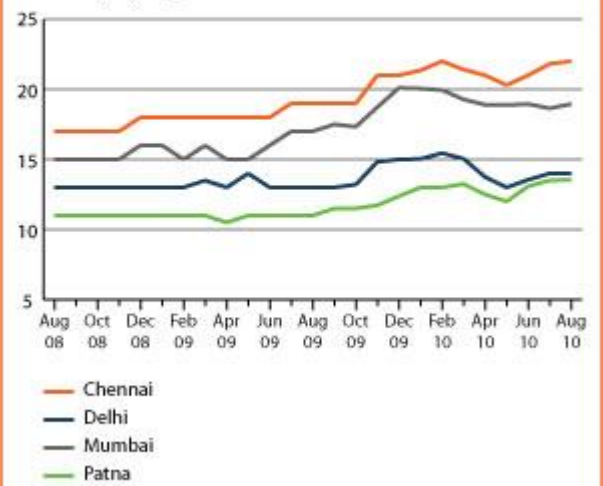
or wheat per month per family at INR 3 per kg. Duty-free imports policy of for rice, wheat, pulses, edible oils, and raw sugar has been extended.



India

Retail wheat prices in major cities

Indian Rupee per kg



Source: Ministry of Consumer affairs

Reference Date: 21-May-2010

FOOD SECURITY SNAPSHOT

- Current *Rabi* wheat harvest is estimated at about the same record level as the previous year.
- Rice prices in some markets remain at their highest levels and wheat prices declining but higher than a year ago.
- High food prices are a cause for concern as food security of low income population is affected negatively.

The 2010 *Rabi* wheat harvest is estimated at about the same record level of the previous year

Harvest of the *Rabi* crops, such as wheat, barley and paddy has been completed. Although there were dry periods during the season, most of the crop is cultivated under irrigation in this season and adequate water supplies mitigated the effect of drought. However, relatively warmer than normal temperatures which forced early maturation of the crop have resulted in lower yields. The Government has increased the minimum support price for wheat by 11 percent over the level of the previous marketing year (Apr./Mar.).

The Indian Meteorological Department has forecast the 2010 monsoon as normal. If this forecast materializes a strong recovery in cereal production is anticipated in 2010/11 marketing year (April/March) over the drought affected level last year.

A severe drought in many parts of the country during the 2009 main *Kharif* season resulted in a reduced foodgrains harvest of 99.85 million tonnes (including rice in milled form), a reduction of 15.5 percent from the 118.14 million tonnes the year before (Directorate of Economics and Statistics). The country is importing small amount of rice depending on the international market conditions to build up stocks for its food distribution programmes.

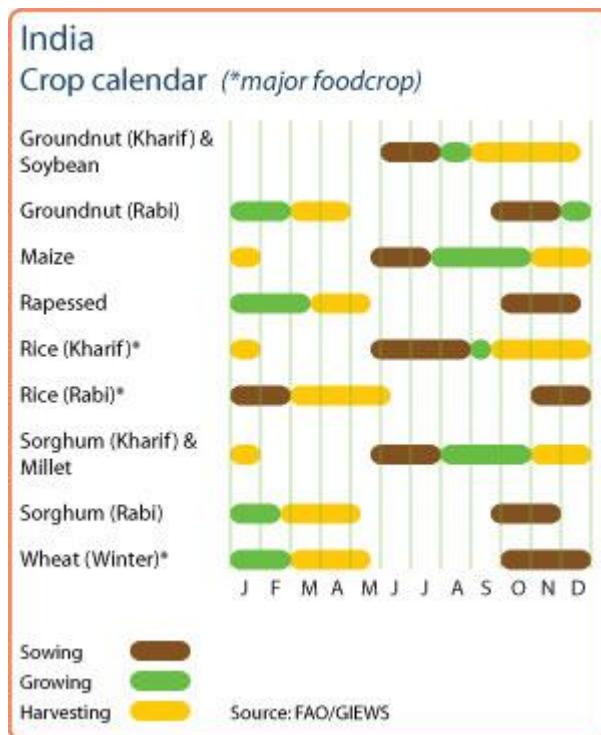
Current prices of rice and wheat generally higher than the same period a year ago

The year-on-year general inflation (based on the wholesale price index for all articles) in April 2010 was estimated at 9.59 percent, slightly below the high level of 10.06 percent during the preceding two months. With poor performance of the main season food crops, the annual inflation has been rising. Food articles inflation, for April is estimated at 16.87 percent including 30.42 percent for pulses and 21.95 percent for milk. Prices of wheat and rice have been rising since June 2009 in most markets. With relatively good harvest of the 2010 wheat crop, prices of this commodity are coming down currently, partly accounting for seasonal price movement.

Export ban on wheat and rice except for the basmati variety, is currently in place. Overall exports have been declined over last ten year period.

Food security is affected by higher food prices

Increasing prices of basic food commodities is affecting food security of population with low incomes and inadequate access to food. Basic cereal price inflation, however, is more-or-less equal to the general

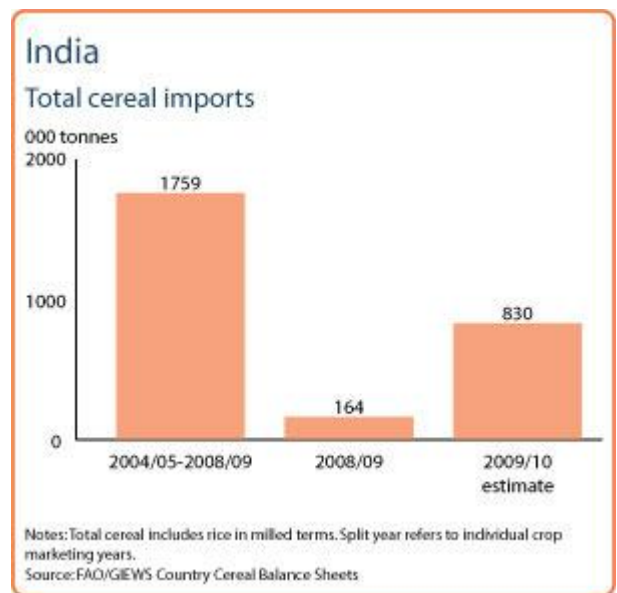
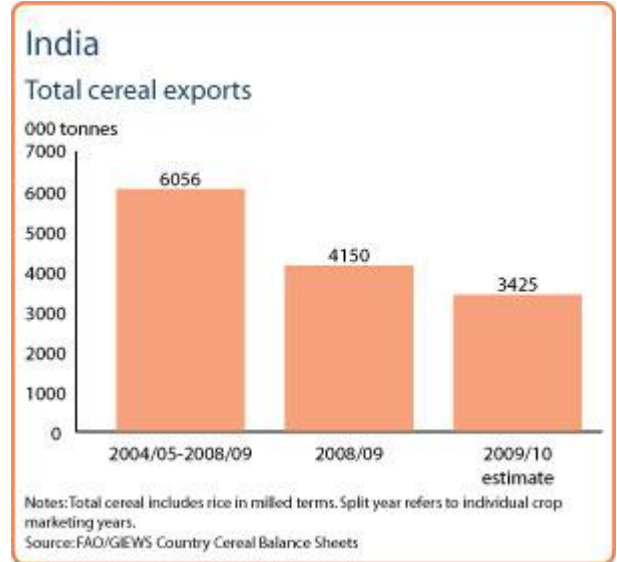


India
Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Rice (paddy)	141089	133958	151000	13
Wheat	74610	80680	80980	0
Maize	16963	16320	18500	13
Others	19419	17120	19405	13
Total	252081	248078	269885	9

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

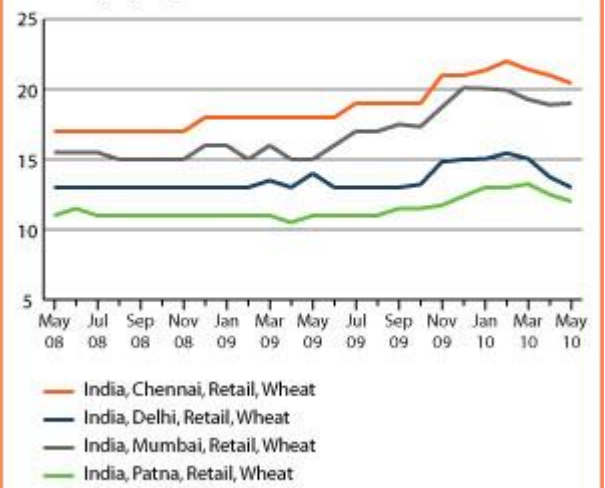
inflation. Among other policy measures, the provision of highly subsidised rice or wheat distribution programme especially for the below-poverty line families under the National Food Security Act has been scaled up. The entitlement under this programme is 25 kg of rice or wheat per month per family at INR 3 per kg. Duty-free imports policy of for rice, wheat, pulses, edible oils, and raw sugar has been extended.



India

Retail wheat prices in major cities

Indian Rupee per kg



Source: Ministry of Consumer affairs

Reference Date: 02- February-2010

FOOD SECURITY SNAPSHOT

- Drought in India reduced production of the 2009 Kharif crops including rice, coarse grains and pulses.
- Early prospects for the current Rabi crop remain uncertain due to prolonged dry spells and erratic rainfall.
- Prices of staple foods have been on upward trend since the middle of 2009 and remain high, mainly for sugar, potatoes and pulses.
- Food security programmes are being scaled up to deal with the effects of drought and global recession.

Drought reduces 2009 *Kharif* rice harvest by 13 million tonnes or some 13 percent over the previous year

Severe drought was experienced in parts of the country during the 2009 main Kharif season. Parts of the country, especially Northern states, although worst affected by the rainfall deficit, were helped due to the available irrigation facilities there. Based on the official estimate from the Ministry of Agriculture, the 2009 total rice production (in paddy terms) would be 129.2 million tonnes (or 86.2 million tonnes of milled rice), a drop of 13 percent from the bumper harvest of the year before and below average. The aggregate 2009 cereal production, including rice in paddy terms, estimated at 243 million tonnes is seen as 9 percent reduction over the 2008 production estimate. The country is importing small amount of rice depending on the international market conditions to build up stocks for its food distribution programmes. Export ban on wheat and on rice except for the basmati variety, is in place.

Uncertain prospects for 2010 *Rabi* crops

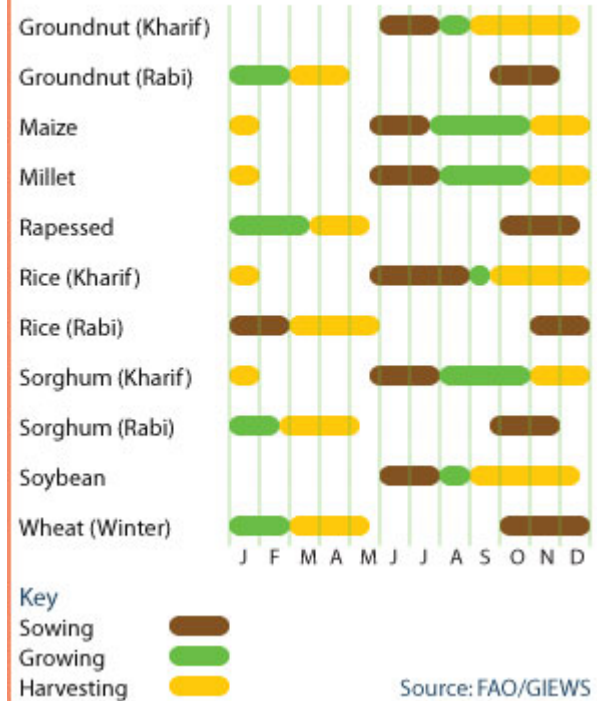
Currently, the 2010 main winter wheat crop and secondary rice crops, sown from last October onwards, are in growing condition. However, given a prolonged dry spells and erratic rainfall since late November prospects for the harvest from April are uncertain as most of the wheat is irrigated in this season.

Current prices of rice and wheat generally higher than the same period a year ago

With poor performance of the main season crops, the annual inflation has been rising; the week ending 16th January 2010 saw annual rate of prices of all articles rise 14.66 percent, up from 13.93 percent the week before. Food price inflation, on the other hand, is currently estimated at 17.40 percent. As can be seen from the price charts here, prices of wheat and rice have been rising since June 2009 in most markets. These rises, in general, are higher than the overall consumer price inflation in the economy. International prices of rice are also rising with strong import demand for the commodity. On the contrary the international export prices of wheat have come down in recent months with slight upward movement in November.

Higher food prices affecting food security

Crop calendar India

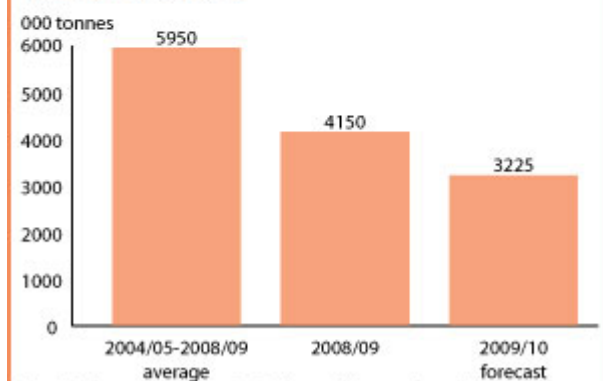


India Cereal production

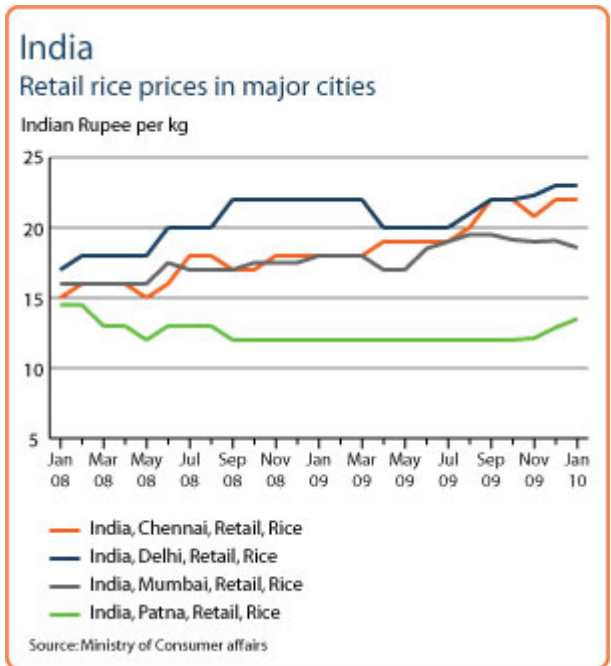
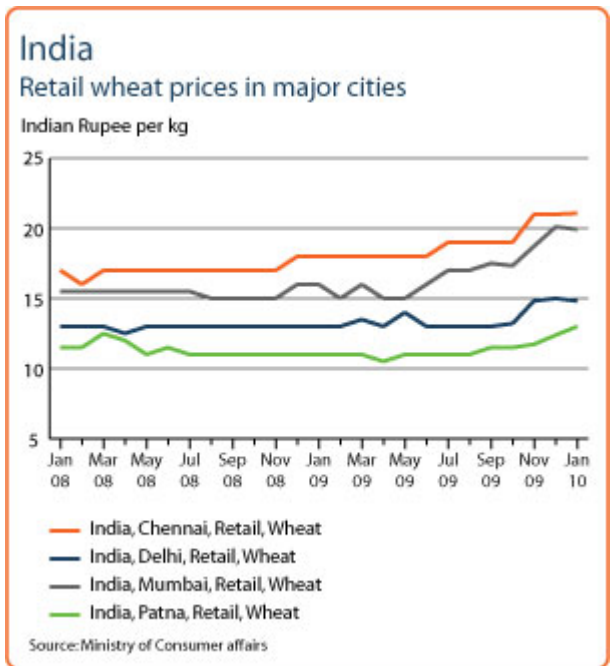
	2004-2008 average	2008	2009 forecast	change 2009/2008
	000 tonnes		percent	
Rice (in milled terms)	92822	99150	86151	-13
Wheat	72904	78570	80580	3
Maize	16448	19290	17610	-9
Others	19864	19850	15600	-21
Total	202038	216860	199941	-8

Note: percentage change calculated from unrounded data.

Total cereal exports



Increasing prices of basic food such as cereals, sugar, pulses and potatoes is affecting food security of population without adequate access to food. This is in spite of a relatively satisfactory overall supply of basic cereals, given the high level of stocks of wheat and rice and continuation of the export ban. Among other policy measures, the provision of highly subsidised rice or wheat distribution programme especially for the below-poverty line families under the National Food Security Act is scaled up. The entitlement under this programme is 25 kg of rice or wheat per month per family at INR 3 per kg. The Government has reduced by INR 200 (USD 4.25) to INR 1 200 -1 600 (USD 26 - 34.68) per quintal the price of wheat sold to bulk consumers from federal stocks. The Government has also extended duty-free sugar imports until March 2010 in an attempt to limit soaring sugar prices. The fast developing situation, however, needs to be watched carefully.



Reference Date: 30- November-2009

FOOD SECURITY SNAPSHOT

- Drought in India reduces production of the 2009 Kharif crops including rice, coarse grains and pulses in nearly half the districts.
- Prices of main foodgrains remain high.
- Food security programmes would need to be scaled up to deal with the effects of drought and global recession.

Drought reduces 2009 *Kharif* rice harvest by 15 million tonnes or some 18 percent over the previous year

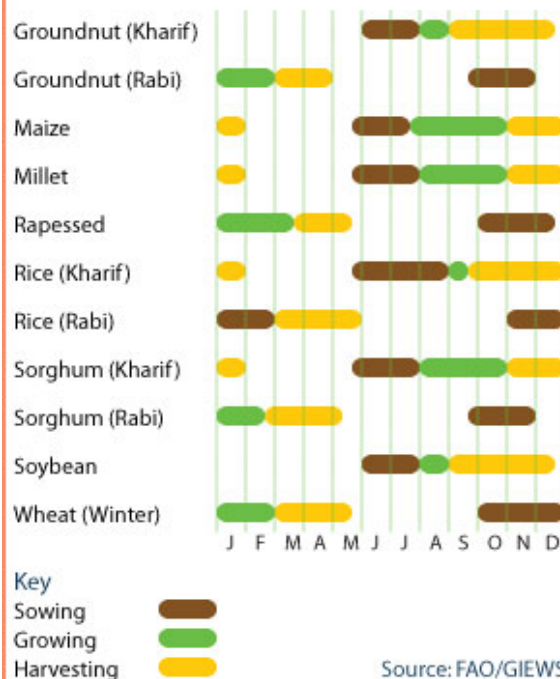
Harvesting of the main season *Kharif* crops, including rice and coarse grains, is nearly completed. Reflecting a significant drought experienced in parts of the country, the official forecast of the 2009 Kharif rice harvest is set at 69.45 million tonnes, some 15.13 million tonnes less than the record harvest in 2008. Out of a total 610 districts nationally, 278 districts in 11 states were declared as drought-hit during this season. According to the India Meteorological Department, the cumulative rainfall for the season (June-September) in 2009 was about 23 percent below the long term average for the country as a whole. Major reduction in paddy plantings was observed in the central states of Uttar Pradesh, Bihar and Jharkhand, southern state of Andhra Pradesh and the eastern state of West Bengal. Northern states, although worst affected by the rainfall deficit, were helped due to the available irrigation facilities there. In addition to water deficit farmers in the affected areas also faced electricity and fuel shortages and higher costs for pumping water for irrigation.

Based on the official forecast from the Ministry of Agriculture, the 2009 total rice production (in paddy terms) would be 125.9 million tonnes (or 83.95 million tonnes of milled rice), a drop of 15 percent from the bumper harvest of the year before. The aggregate 2009 cereal production, including rice in paddy terms, estimated at 241 million tonnes is seen as 9 percent reduction over the 2008 production estimate. It is expected that India may import small amount of rice depending on the international market conditions. However, given the usual exports of basmati variety, the country will remain a net exporter of rice.

Based on the past five-year average, cereal production from the *Kharif* season amounts to about 53 percent of total annual production, however, *Kharif* rice accounts for about 85 percent of the annual production. The crops that were most affected due to the drought include - sugarcane and rice-paddy in irrigated areas and coarse grains and pulses in dry land areas. Government recently increased support price of paddy from INR 850 to INR 950 per quintal and similar increases for some other food crops were promised.

According to the Ministry of Agriculture, planting of 2009/10 *Rabi* season crops particularly wheat, sorghum, rapeseed and mustard has begun with fairly good distribution of rains.

Crop calendar India

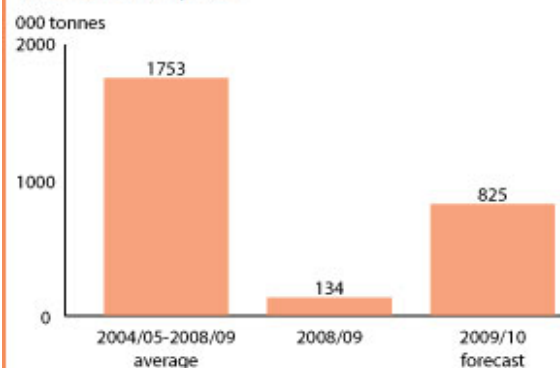


India Cereal production

	2004-2008 average	2008	2009 forecast	change 2009/2008
	000 tonnes			percent
Rice (in paddy terms)	139226	148718	125920	-15
Wheat	72904	78570	80580	3
Maize	16448	19290	17610	-9
Others	19864	19850	17140	-14
Total	248442	266428	241250	-9

Note: percentage change calculated from unrounded data.

Total cereal imports



Notes: Total cereals includes rice in milled terms. Split year refers to individual crop marketing years.

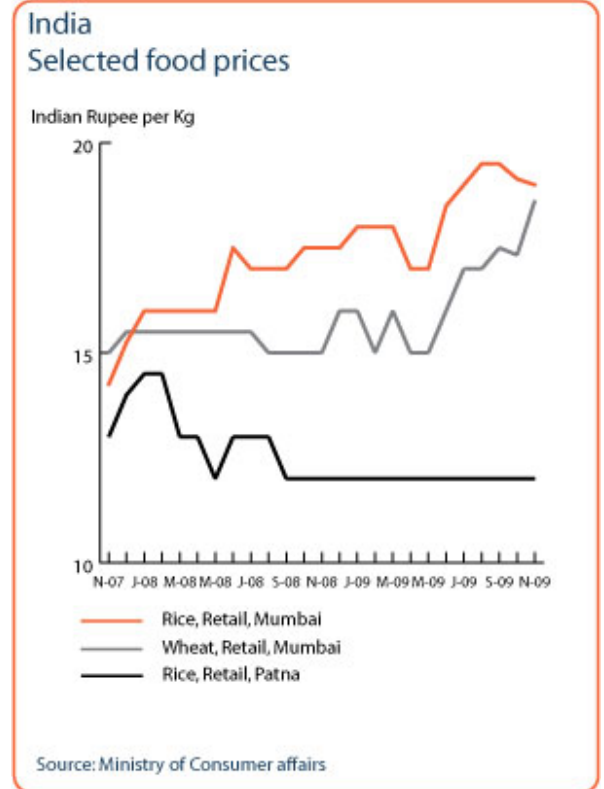
Source: FAO/GIEWS Country Cereal Balance Sheets

Current prices of rice and wheat generally higher than the same period a year ago

With poor performance of the main season crops, the annual food price inflation has been rising; the week ending 7th November 2009 saw annual rate of food price rise 14.55 percent, up from 13.68 percent the week before. Prices of rice have been rising since June 2009 in the unregulated markets. Rice price in Mumbai, for example, were 33 percent higher in November 2009 compared to the same month 2 years earlier. Wheat prices followed the same trend in recent months but due to good domestic production are only 24 percent above the level of two years earlier. This rise is higher than the general inflation in the economy. On the contrary the international export prices of rice and wheat have come down in recent months with slight upward movement in November. But for lack of significant trade in these two commodities the international price movements may not be transmitted into the domestic markets.

Overall food security is satisfactory

In spite of the estimated reduction in foodgrain production of this season, the overall food security in India is considered to be satisfactory given the high level of food stocks on hand (estimated at some 33 million tonnes of rice and 25 million tonnes of wheat), continuation of the export ban, and the provision of highly subsidised rice or wheat distribution programme especially for the below-poverty line families under the National Food Security Act. The entitlement under this programme is 25 kg of rice or wheat per month per family at INR 3 per kg. The fast developing situation, however, needs to be watched carefully.



Reference Date: 08-September-2009

FOOD SECURITY SNAPSHOT

- Drought in India is expected reduce production of the 2009 Kharif crops including rice, coarse grains and pulses in nearly half the districts.
- Prices of main foodgrains remain high.
- Food security programmes would need to be scaled up to deal with the effects of drought and global recession.

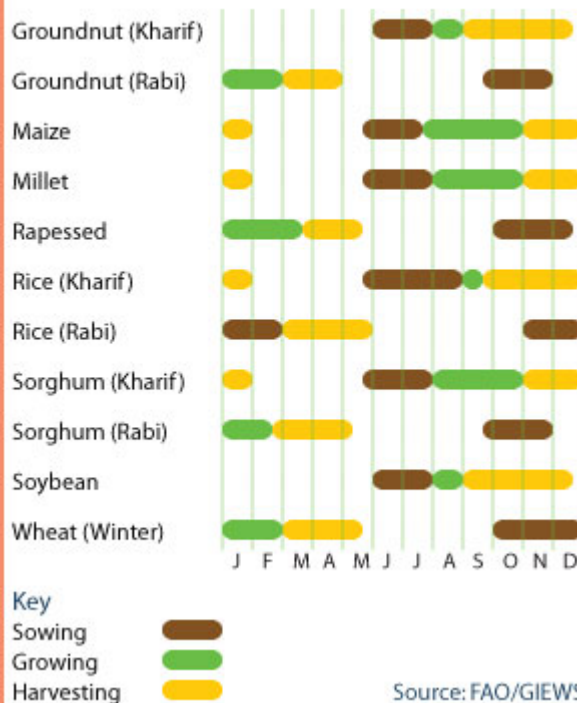
Out of a total 610 districts nationally, 278 districts in 11 states have been declared as drought-hit during this *Kharif* season

The southwest summer monsoon rains normally start early June in the south and work their way to the north by mid-July to begin the main *Kharif* cropping season. However, according to the India Meteorological Department (IMD), the cumulative rainfall from 1 June to 26 August this year was 25 percent below the long term average for the country as a whole. The cumulative rainfall deficit was highest in the North - 40 percent in the North-West and 25 percent in the North-East, while, the Central parts of the country faced 20 percent deficit. The South Peninsula was affected the least experiencing some 14 percent rain deficit. The rain deficit is also affecting water supplies and farmers in the affected areas are reportedly facing electricity and fuel shortages or higher costs for pumping water for irrigation. The National Crop Forecasting Centre has indicated that as of 28 August 2009, area sown nationally under all *Kharif* crops was 86.756 million hectares, which is 8 percent below the last year's area sown by this time. Major reduction in paddy plantings is observed in the central states of Uttar Pradesh, Bihar and Jharkhand, southern state of Andhra Pradesh and the eastern state of West Bengal. Area planted in some of the northern states was likely helped due to the available irrigation facilities there. Water stock in selected 81 major reservoirs in the country currently is measured at 67 percent.

Although the exact impact of the late plantings is not yet known, one official statement indicated a reduction in rice production by 10 million tonnes (equivalent to about 12 percent of last year's *kharif* rice production) and another referred to a drop in farm production of *Kharif* season by 15 to 20 percent.

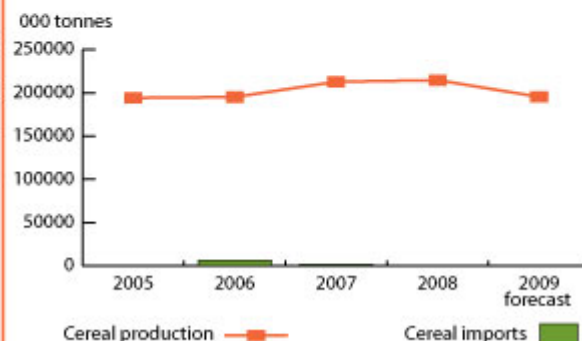
Based on the past five-year average, cereal production from the *Kharif* season amounts to about 53 percent of total annual production, and about 85 percent of the main staple rice production. India produced 117.7 million tonnes of foodgrains during the last *Kharif* season. The crops that are most affected include - sugarcane and rice-paddy in irrigated areas and coarse grains and pulses in dry land areas. Government recently announced an increase in support price of paddy from INR 850 to INR 950 per quintal and similar increases for some other food crops have been promised.

Crop calendar India



Cereal production and imports India

Cereal production	2004-2008 average	2008	2009 forecast	change 2009/2008
	000 tonnes			percent
Rice (milled)	92822	99150	81004	-18.3%
Wheat	72884	78570	80580	2.6%
Maize	16270	18480	16000	-13.4%
Other	19651	18540	17819	-3.9%
Total Cereals	200848	214740	195403	-9%



Source: FAO/GIEWS Country Cereal Balance Sheets

Current prices of rice and wheat generally higher than the same period a year ago

Retail prices of rice in August 2009 were higher in Mumbai, and Chennai, they remained about the same in Patna and declined slightly in Delhi. Prices of rice are likely to be under further pressure in anticipation of the unfavourable harvest of the current *Kharif* season. Wheat prices have also followed similar suit in that they are up in Mumbai and Chennai markets and remained more-or-less stable in the other two markets. On the contrary the international export prices of rice and wheat have come down in August 2009 compared to the same period a year ago. But for lack of significant trade in these two commodities these price movements are not transmitted into the domestic markets.

Overall food security is satisfactory

In spite of the expected reduction in foodgrain production of this season, the overall prospective food security in India is considered to be satisfactory given the high level of food stocks on hand (estimated at some 33 million tonnes of rice and 25 million tonnes of wheat), continuation of the export ban, and the provision of highly subsidised rice or wheat distribution programme especially for the below-poverty line families under the National Food Security Act. The entitlement under this programme is 25 kg of rice or wheat per month per family at INR 3 per kg. The fast developing situation, however, needs to be watched carefully.

