

## Evaluation of Rabi Sowing Intention Report

EAR released the Rabi Sowing Intentions report during mid Oct, 2015 first of its kind. The purpose was to have an initial feeling about the supply during Rabi season of major agricultural commodities by studying the choices that Indian farmers would take at the time of sowing.

EAR tried to analyse the acreage based on water availability, competing crops, prevailing prices during the sowing time and peak harvest season, return on investment. Production estimates were also given based on the assumption of normal and below normal monsoon patterns.

This document evaluates the Rabi Sowing Intention Report released in Oct compared to the actual sowing data released by the Ministry of Agriculture.

**Of the eight crop estimated actual sowing of Mustard seed matched that of the EAR report.**

**Acreage Maize and Wheat moved in the direction of forecast but the variations were larger than the forecast.**

**However the report failed to assess the severity of drought in North and Central India. Farmers' survey had shown intent of sowing many of the crops in response to very good prices, but severe drought did not allow them to carry out the sowing.**

**As a result sowing intention of other crops viz., Barley, Rice, Chana, Yellow pea and Lentils the actual acreage went exactly opposite to the EAR forecast.**

Region wise crop wise analysis is given below for the reader to make his/her own conclusions.

## Oilseeds

### Mustard Seed

**Total Mustard Seed acreage was in line with EAR forecast.**

Area in Lakh ha	2014/15	2015/16			
		EAR Forecast	Actual Acreage	Forecast Vs LY	Actual Vs LY
Rajasthan	2,474	2,380	2,385	-3.8%	-3.6%
Uttar Pradesh	730	695	720	-4.8%	-1.4%
Madhya Pradesh	665	645	625	-3.0%	-6.0%
Haryana	525	550	580	4.8%	10.5%
West Bengal	475	470	476	-1.1%	0.2%
Others	1,085	1,092	1,100	0.6%	1.4%
<b>INDIA</b>	<b>5,954</b>	<b>5,832</b>	<b>5,886</b>	<b>-2.0%</b>	<b>-1.1%</b>

The largest and the most important Mustard Seed growing state Rajasthan opted for this oilseed crop in line with the EAR estimates. Prediction in other major states such as Uttar Pradesh and Madhya Pradesh were in the same direction. However, forecast was off the mark in minor states.

Lower acreage under its major competitive crop Wheat due to severe drought led to higher acreage under Mustard in Uttar Pradesh, Haryana and West Bengal.

## Grains

### Maize

**EAR Maize acreage was in line with forecast however, the increase was lower than EAR forecast.**

EAR expected Maize acreage to increase by 3% but actual sowing was up by just 0.9%. Moreover, the variation between states was also higher than we expected. Acreage in Bihar and Tamilnadu was much higher versus our estimate. However, it was reverse in the case of Andhra, Maharashtra and Karnataka. Severe drought amidst less water in dam lowered the acreage in Maharashtra and South India.

Area in Lakh ha	2014/15	2015/16			
		EAR Forecast	Actual Acreage	Forecast Vs LY	Actual Vs LY
Bihar	460	480	550	4.3%	19.6%
Andhra Pradesh	337	370	255	9.8%	-24.3%
Jharkhand	245	250	250	2.0%	2.0%
Maharashtra	220	230	212	4.5%	-3.6%
Karnataka	107	140	102	30.8%	-4.7%
Tamil Nadu	178	185	202	3.9%	13.5%
Others	302	250	295	-17.2%	-2.3%
<b>INDIA</b>	<b>1,849</b>	<b>1,905</b>	<b>1,866</b>	<b>3.0%</b>	<b>0.9%</b>

### Barley

**Barley acreage declined against the EAR projection of steady acreage.**

Area in Lakh ha	2014/15	2015/16			
		EAR Forecast	Actual Acreage	Forecast Vs LY	Actual Vs LY
Rajasthan	360	360	331	0.0%	-8.1%
Uttar Pradesh	161	160	151	-0.6%	-6.2%
Haryana	50	52	54	4.0%	8.0%
Madhya Pradesh	83	85	80	2.4%	-3.6%
Others	78	78	78	0.0%	0.0%
<b>All INDIA</b>	<b>732</b>	<b>735</b>	<b>694</b>	<b>0.4%</b>	<b>-5.2%</b>

EAR was expecting almost same acreage under Barley on anticipation of lower acreage under Wheat due to its high water requirement. However, farmers were not able to take both the crops as rainfall was almost nil in major Barley growing during the sowing window.

## Wheat

Farmers shifted away from Wheat as anticipated by EAR survey, but the shift was larger than expected due to scarcity of water.

Area in Lakh ha	2014/15	2015/16			
		EAR Forecast	Actual Acreage	Forecast Vs LY	Actual Vs LY
Uttar Pradesh	9,867	9,768	9,499	-1.0%	-3.7%
Madhya Pradesh	5,844	5,786	5,184	-1.0%	-11.3%
Punjab	3,500	3,525	3,497	0.7%	-0.1%
Rajasthan	2,771	2,605	2,966	-6.0%	7.0%
Haryana	2,490	2,460	2,511	-1.2%	0.8%
Bihar	2,303	2,257	2,270	-2.0%	-1.4%
Gujarat	1,134	1,100	900	-3.0%	-20.6%
Maharashtra	859	900	620	4.8%	-27.8%
Others	1,825	1,824	1,825	-0.1%	0.0%
<b>INDIA</b>	<b>30,593</b>	<b>30,225</b>	<b>29,272</b>	<b>-1.2%</b>	<b>-4.3%</b>

Acreage loss was much higher than EAR forecast. The most acreage loss was witnessed over Central India when compared to North India. Severe drought and lack of water in dams has led to lower acreage under Wheat than we anticipated.

## Paddy

Paddy acreage forecast was exactly opposite to the actual acreage under this crop.

Area in Lakh ha	2014/15	2015/16			
		EAR Forecast	Actual Acreage	Forecast Vs LY	Actual Vs LY
West Bengal	1,275	1,236	1,200	-3.1%	-5.9%
Andhra Pradesh	1,150	1,220	987	6.1%	-14.2%
Assam	402	395	395	-1.7%	-1.7%
Orissa	290	295	275	1.7%	-5.2%
Karnataka	285	292	270	2.5%	-5.3%
Tamil Nadu	180	182	185	1.1%	2.8%
Others	390	393	390	0.8%	0.0%
<b>INDIA</b>	<b>3,972</b>	<b>4,013</b>	<b>3,702</b>	<b>1.0%</b>	<b>-6.8%</b>

EAR expected more fallow land to come under paddy cultivation due to the delayed monsoon specially in major coastal states of Andhra, West Bengal and Orissa. However, acreage in Andhra and Orissa was much lower than we thought as farmers shifted towards more remunerative crop Urad. Acreage loss was also seen in Karnataka and other states. However, due to floods in Tamilnadu acreage was marginally higher than we thought.

## Pulses

### Chana

Chana acreage was much lower than EAR forecast despite very good prices and farmers' intent to sow the pulse. Acreage was sharply lower in Madhya Pradesh and Rajasthan.

Area in Lakh ha	2014/15	2015/16			
		EAR Forecast	Actual Acreage	Forecast Vs LY	Actual Vs LY
Madhya Pradesh	2,916	3,150	2,732	8.0%	-6.3%
Rajasthan	1,497	1,580	1,238	5.5%	-17.3%
Maharashtra	1,233	1,425	1,440	15.6%	16.8%
Andhra Pradesh	516	520	559	0.8%	8.3%
Uttar Pradesh	590	480	390	-18.6%	-33.9%
Karnataka	1,041	1,091	1,400	4.8%	34.5%
Others	781	860	804	10.1%	2.9%
<b>INDIA</b>	<b>8,574</b>	<b>9,106</b>	<b>8,563</b>	<b>6.2%</b>	<b>-0.1%</b>

Acreage fall was much more in major producing states viz., Madhya Pradesh and Rajasthan. EAR had forecasted higher Chana acreage at the cost of Wheat acreage due to prevailing record prices at the time of sowing. However, our projection failed to materialize as farmers shifted towards other crops such as Lentils in Madhya Pradesh. Major producing belt of Uttar Pradesh couldn't carry out sowing due to severity of drought.

### Lentils

Acreage change in lentils declined against the projection of rise in acreage.

Area in Lakh ha	2014/15	2015/16			
		EAR Forecast	Actual Acreage	Forecast Vs LY	Actual Vs LY
Madhya Pradesh	508	585	546	15.2%	7.5%
Uttar Pradesh	610	625	450	2.5%	-26.2%
Others	405	410	349	1.2%	-13.8%
<b>INDIA</b>	<b>1,523</b>	<b>1,620</b>	<b>1,345</b>	<b>6.4%</b>	<b>-11.7%</b>

The actual acreage under Lentils was much lower than anticipated in Madhya Pradesh, Uttar Pradesh and other states.

### Yellow Pea

Yellow Pea acreage remained marginally lower against the Ear projection of rise in area under this pulse.



Area in Lakh ha	2014/15	2015/16			
		EAR Forecast	Actual Acreage	Forecast Vs LY	Actual Vs LY
Madhya Pradesh	326	328	450	0.6%	38.0%
Uttar Pradesh	333	347	233	4.2%	-30.0%
Others	174	180	145	3.4%	-16.7%
<b>INDIA</b>	<b>833</b>	<b>855</b>	<b>828</b>	<b>2.6%</b>	<b>-0.6%</b>

Prolonged dry spell during the sowing window in Uttar Pradesh resulted in much lower acreage in the state. However, acreage loss in Uttar Pradesh was compensated by much increase in Madhya Pradesh which reported almost 38% increase in acreage.



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