

India's Agriculture Sector: An Analytical Assessment



A COMPREHENSIVE ASSESSMENT OF THE AGRICULTURE SECTOR IN INDIA

IMA's 2019 report on India's Agriculture provides a detailed analysis of supply and production; yields and productivity; the input side; farming economics; the operating regime; and trends driving future risks and opportunities. It also offers a forward view on what to expect in terms of Government action and policy decisions.

The 60-page report provides:

- ✓ **A wide-ranging analysis** of all aspects of agriculture – crop farming, fishing, poultry, dairying, etc
- ✓ **Drill-down insights, by crop and by state** into key parameters such as yield, production, consumption, input usage, mechanisation, etc
- ✓ **Analysis of the economics of farming** – costs, credit, incomes and profitability
- ✓ **Global benchmark comparisons** on key parameters
- ✓ **Assessment** of the regulatory environment for the sector, and likely developments in the coming years
- ✓ **Comprehensive statistics and data**



Trends for the last ten years



Projections for 2027



Regional, country, state and crop-wise analysis



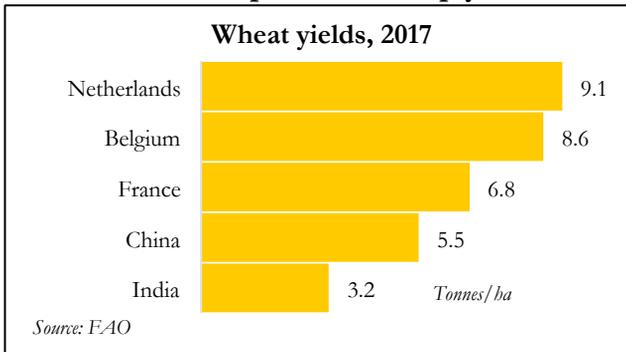
Policy analysis and likely developments



Business and market opportunities

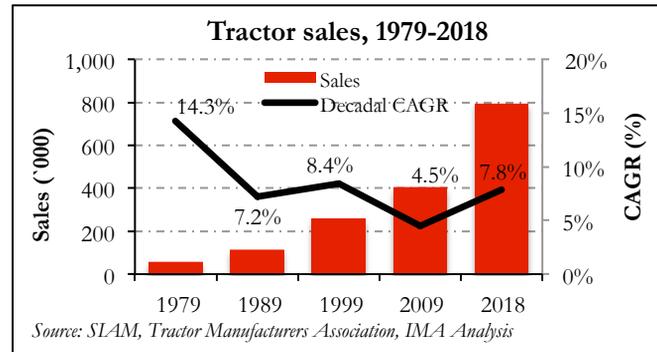
HIGHLIGHTS: DEEP-DIVE TO IDENTIFY TRENDS AND OPPORTUNITIES

Global comparison of crop yield



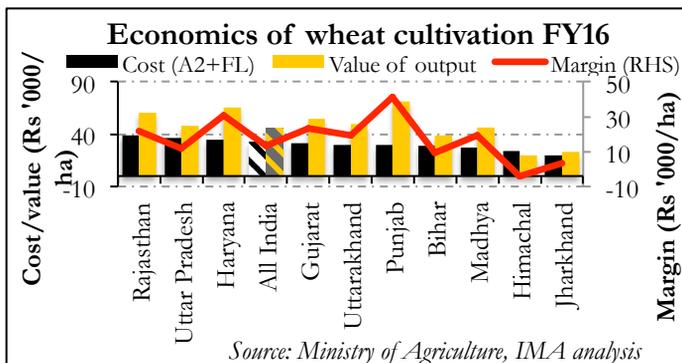
Average Indian yields for most crops are among the lowest in the world.

Tractor sales



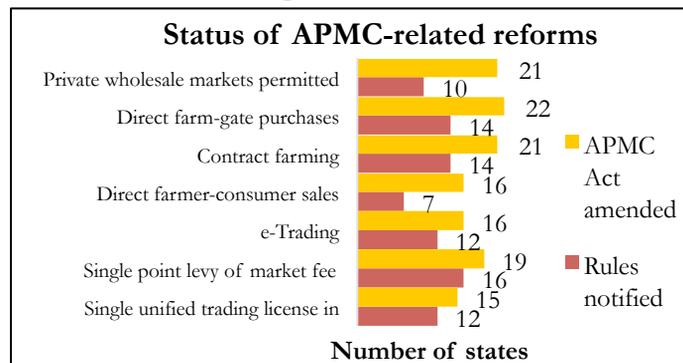
India is the world's largest tractor market, growing at 7-8% rates per annum.

Cost of Cultivation



Conventional food crops have low profitability, prompting farmers to shift to higher value crops.

Agri Reforms



States have begun reforming their agricultural markets but many changes are only on paper.

Other Highlights

- Farmers' access to credit from the formal banking system grew 5-fold in the decade to 2017-18.
- Mechanisation is picking up quickly but varies across crops and stages of farm activity.
- The shift to higher value crops can improve the economic viability of farming.
- Land and policy reforms can dramatically raise agricultural and rural prosperity.

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CONTENTS OF THE REPORT

Introduction and Overview

- Agriculture vs non-agriculture growth
- Agriculture as a share of GDP
- Area under major crops: FY07 to FY17
- Compositional shifts in the farm workforce
- Summaries of all chapters

Output and Yield

- State- and crop-wise trends in output, yield and area
- State-wise milk production and decadal growth
- Meat and poultry production

The Input Side

- Land: Distribution of landholdings, by farmer type and state
- Policy context: Status of land reforms; state-wise variations
- Water: Output and rainfall, crop-wise analysis; irrigation coverage and investments; water productivity; micro-irrigation; policy actions
- Mechanisation: drivers of mechanisation in India; stage and crop level mechanisation; role of private sector; policy context
- Soil Health: region-wise soil health analysis; fertiliser usage, prices and subsidies; soil conservation efforts; Government action
- Crop protection: pesticides usage; policy issues; outlook
- Input costs: cost vs output value; profitability of crops at state level

Credit & Insurance

- Access to credit: borrowing sources; farmer indebtedness; loan waivers; policy action; Government efforts
- Insurance penetration: state-wise coverage; company-wise details; policy issues and Government intervention; global comparisons

Market Linkages

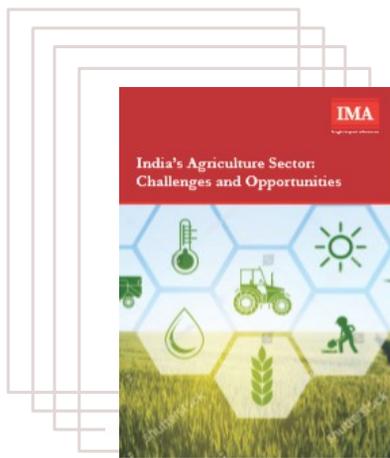
- Market regulations: factors impacting prices and margins; reforms status; e-Nam; Contract farming; policy outlook
- Prices: analysis of MSPs; crop-wise comparisons; policy action
- Cold chain: challenges; way forward

Looking Ahead

- Emerging business opportunities
- The policy agenda for Agriculture
- Fixing the input side issues
- Fostering competitive agriculture markets

OUR REPORTS

Thematic and Industry Reports



- ▶ Indian Agriculture: An Analytical Assessment, 2019
- ▶ Indian Agriculture: Challenges & Opportunities, 2019
- ▶ The India Employment Report 2017
- ▶ Diversity Underlying Unity: IMA India's Study on India's States 2018
- ▶ The India Consumption Report 2016

Functional and Management Insights



- ▶ Finance Department Performance Benchmarks 2018-19
- ▶ Diversity & Inclusion Benchmarks Report
- ▶ The 2019 Executive & Board Remuneration Report
- ▶ Digital Marketing Benchmarks (Coming soon)
- ▶ The 2018-19 CXO Compensation Survey

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