

# India's Agriculture Sector: Challenges and Opportunities



# 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 135-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
- ✓ **Identification** of emerging business opportunities and pockets of agricultural prosperity
- ✓ **Comprehensive statistics and data**



**Trends for the last ten years**



**Projections for 2027**



**Regional, country, state and crop-wise analysis**



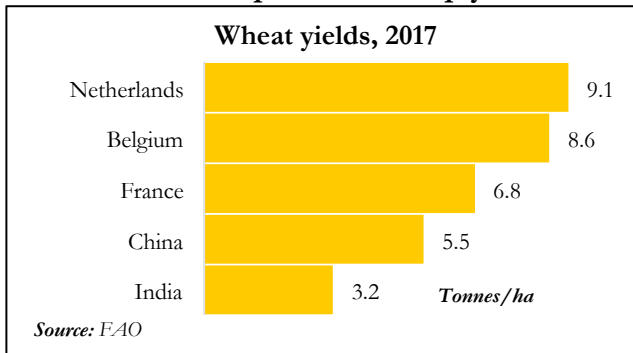
**Policy analysis and likely developments**



**Business and market opportunities**

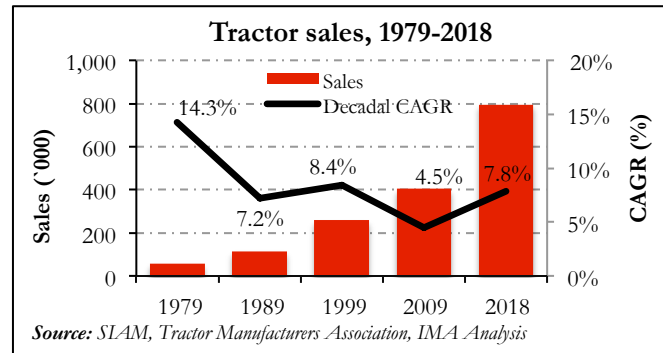
# HIGHLIGHTS: DEEP-DIVE TO IDENTIFY TRENDS AND OPPORTUNITIES

## Global comparison of crop yield



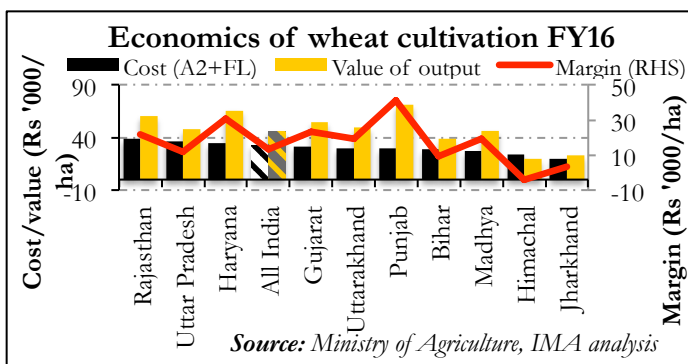
Average Indian yields for most crops are among the lowest in the world.

## Tractor sales



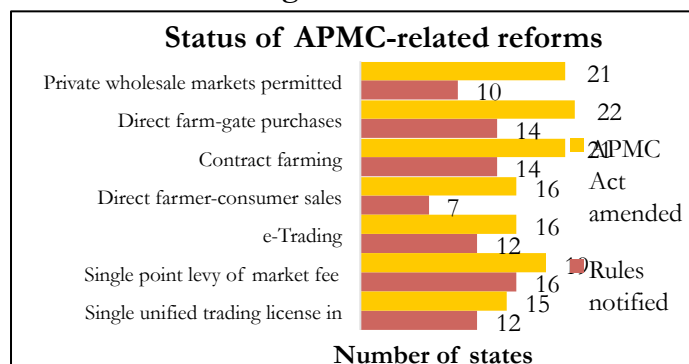
India is the world's largest tractor market, growing at 7-8% rates per annum.

## 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

## Global Mega Trends



- Agriculture's share of GDP and employment, by region and country
- Patterns of food production, demand and trade
- Agricultural inputs: fertilisers, pesticides and water
- Farm mechanisation and technological change
- Agriculture 4.0: key trends

## 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

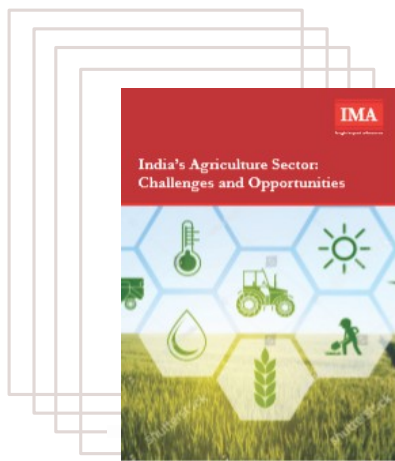
## Looking Ahead



- 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: 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
- ▶ The 2018-19 CXO Compensation Survey
- ▶ The 2018 Executive & Board Remuneration Report
- ▶ Digital Marketing Benchmarks (Coming soon)
- ▶ Diversity & Inclusion Report (Coming Soon)

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