Rice Sector in Bangladesh: What the Future Looks Like?
Contents of the presentation

- Introduction
- Production, Consumption and Trade
- Policies (Agricultural, Food and Biotechnology)
- Key Challenges of the Rice Sector
- Conclusions
Bangladesh at a Glance  Geographical Location

[Map showing Bangladesh's location in South Asia with a pointer labeled "Bangladesh"]
Introduction

- Rice is the major staple, food security means rice security
- It provides income, employment and food directly or indirectly for more than 70% of the people
- Sector is a major source of calorie intakes
- From rice deficit to almost self-sufficient for some of the years in last decade
- Have three rice seasons (Aus, Aman and Boro)
- Have both irrigated and rainfed rice
Rice production trends in Bangladesh

Boro Rice production trends in Bangladesh
## Rice Production Growth (%)

<table>
<thead>
<tr>
<th>Rice varieties</th>
<th>Production</th>
<th>Growth rate (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1985/86</td>
<td>2007/08</td>
</tr>
<tr>
<td>Aus</td>
<td>2828</td>
<td>2215</td>
</tr>
<tr>
<td>Aman</td>
<td>8540</td>
<td>13045</td>
</tr>
<tr>
<td>Boro</td>
<td>3670</td>
<td>16945</td>
</tr>
<tr>
<td>Total</td>
<td>15038</td>
<td>32205</td>
</tr>
</tbody>
</table>

**Source:** Chowdhury (2010)
Yield trends of different rice (ton/acre)

Yield trends show that Boro yield is much higher than Aus and Aman and increasing over time.
### Production and consumption gap (in `000 mtons)

<table>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Mid-Year Population (in millions)</td>
<td>140,0</td>
<td>142,0</td>
<td>144,0</td>
<td>145,9</td>
<td>147,9</td>
<td>149,7</td>
<td>151,6</td>
<td>153,5</td>
</tr>
<tr>
<td>Net Foodgrain Requirement (@489 gm/day/capita)</td>
<td>24988</td>
<td>25345</td>
<td>25702</td>
<td>26041</td>
<td>26398</td>
<td>26719</td>
<td>27058</td>
<td>27397</td>
</tr>
<tr>
<td>Gross Foodgrain Production</td>
<td>26133</td>
<td>27266</td>
<td>28055</td>
<td>29775</td>
<td>32166</td>
<td>33158</td>
<td>34513</td>
<td>34792</td>
</tr>
<tr>
<td>Net Foodgrain Production (88% of Gross Production)</td>
<td>22997</td>
<td>23994</td>
<td>24688</td>
<td>26202</td>
<td>28306</td>
<td>29179</td>
<td>30371</td>
<td>30617</td>
</tr>
<tr>
<td>Foodgrain Deficit/Surplus</td>
<td>1991</td>
<td>1351</td>
<td>1013</td>
<td>(161)</td>
<td>(1908)</td>
<td>(2460)</td>
<td>(3313)</td>
<td>(3220)</td>
</tr>
</tbody>
</table>
Total rice import trend (m ton)
Private and public imports of rice (m ton)

- Private Import
- Public Import

M.Ton

Table Private and public imports of rice

<table>
<thead>
<tr>
<th>Year</th>
<th>% of imports to total</th>
<th>Private imports</th>
<th>Public imports</th>
</tr>
</thead>
<tbody>
<tr>
<td>1997/98 to 1999/2000</td>
<td>92.4</td>
<td>7.6</td>
<td></td>
</tr>
<tr>
<td>2000/01 to 2003/04</td>
<td>96.8</td>
<td>3.2</td>
<td></td>
</tr>
<tr>
<td>2004/05 to 2007/08</td>
<td>95.9</td>
<td>4.1</td>
<td></td>
</tr>
</tbody>
</table>

Source: Chowdhury (2010)
Rice market

- Domestic production
- Procurement
- Open market sale
- Public import
- Food aid/grant
- Rest of world
- Public food distribution system
- Public stock
- Private import
- Private stock
- Consumption
- Monetary distribution
- Non-monetary distribution
- Non-monetary distribution

Meeting World Food Needs with GM Rice
Rice Import Policy in Bangladesh (CIP?)

1) Tariff varies, some years almost zero

2) Private imports (Imports from India) contributed a lot in 1998 and 2002 when there were production shocks but during the price hikes in 2007-08 it did not work because of the export restrictions of India

3) Rice import dependency (import/availability) is 1.4% (average 07/08 – 09/10) BUT there is a target to 0% by 2015 (in CIP)
Key challenges in the sector

- Climate changes (some programs for new varietal development)
- Yield gap
- Post-harvest losses

State of GM rice (food) policies

Still it is in the experimental lab!
Thank you!!