Agriculture Report

Crisil Intelligence

Monthly Dashboard: September 2025

Strictly confidential. Not for distribution

11/09/2025

Research

by S&P Global

Agriculture at a glance – September 2025

Rainfall
(June 1- August 28, 2025)

India received **6% excess rainfall** at Pan India.

Reservoir Storage
(As of 4th September 2025)

Reservoir levels were 7**% higher** than last year at ~158 BCM, with all the regions exceeding 10-year averages

Kharif Acreage (MY26P)

- Overall kharif acreage is expected to decline marginally by 0–1%. The reduction is led by crops such as sugarcane (3 to 4%) and soybean (3 to 4%), while increases are seen in paddy (1 to 2%), maize (3 to 4%), bajra and groundnut.

Prices (Q3 CY25)

- The weighted average crop price index fell ~5% YoY, while the horticulture index also recorded a decline of ~24% during the same period.

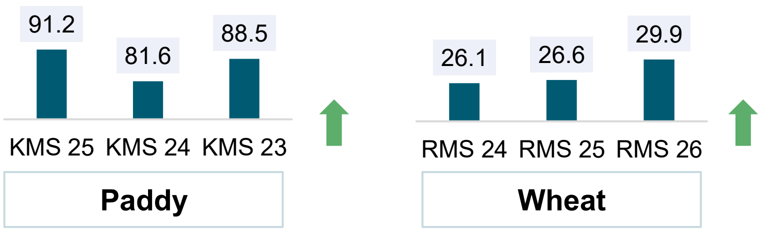
Agri Input Sectors (Q1 FY26)

- All major agri input sectors showed positive trend in Q1 FY26
- Revenue for seeds, tractors, fertilizers, irrigation and pesticides sector increased by ~17%, ~16%, ~9%, ~5% and ~3% respectively

Kharif Production (MY26P)

- Production is expected to decline 2-3% due to lower acreage from pest issues in sugarcane, cotton, and urd.
- Yield improvements are expected in paddy, maize, and crops like bajra and groundnut due to good rainfall and farming practices.
- Heavy rainfall likely to reduce overall production

Procurement (Kharif & Rabi MY25, in MMT)



Paddy procurement in KMS 2025 and wheat procurement in RMS 2025 has been completed as of 6th Sep 2025.

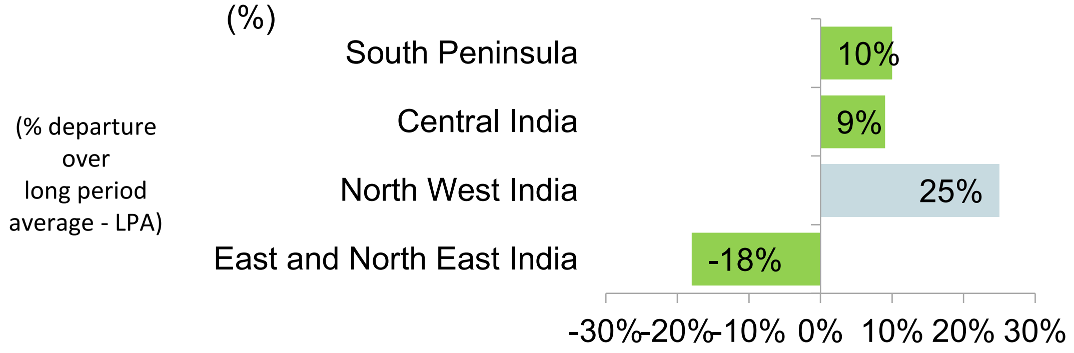
Agri Credit (July 25)

- Remained stable on month

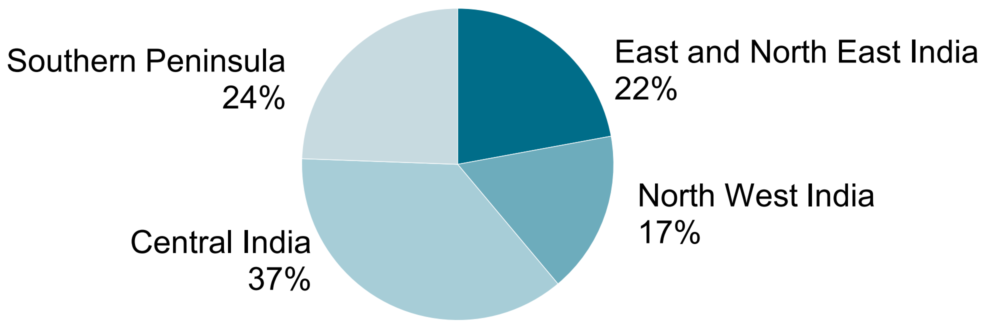
- *Agriculture credit data is available till July 2025.*
- *Marketing Year (MY) refers to the sale period; for instance, kharif sown in May–Aug 2025 and marketed in Jul 2025–Jun 2026 is MY2026P, while rabi sown in Oct 2024–Jan 2025 and marketed in Jan–Dec 2025 is MY2025P.*
- *Q3 CY25 includes July 2025 and August 2025*
- *In KMS 2025, kharif procurement (Sep 2024–Jun 2025) and rabi procurement (Sep 2024–Aug 2025) has been completed as of 6th Sep 2025, whereas RMS 2026 wheat procurement (Mar–Jun 2025) has been completed. Both paddy and wheat procurement data is sourced from FCI.*
- *Source: Crisil Intelligence, NAFED, FCI.*

Northwest received rainfall in excess

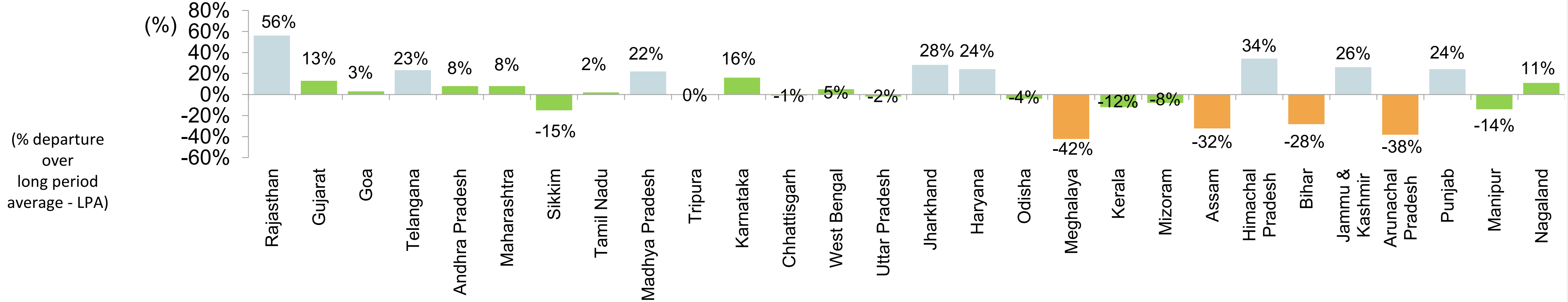
Regional Rainfall Distribution



Share of regions in crop production (total sown area)



State-wise Rainfall Distribution



>60%	+20% to +59%	- 19% to +19%	-20% to -59%	>-60%
Largely excess	Excess	Normal	Deficit	Largely Deficit

Note: Rainfall includes data from 1st June'25 to 28th August'25
Source: Indian Metrological Department (IMD), Crisil Intelligence

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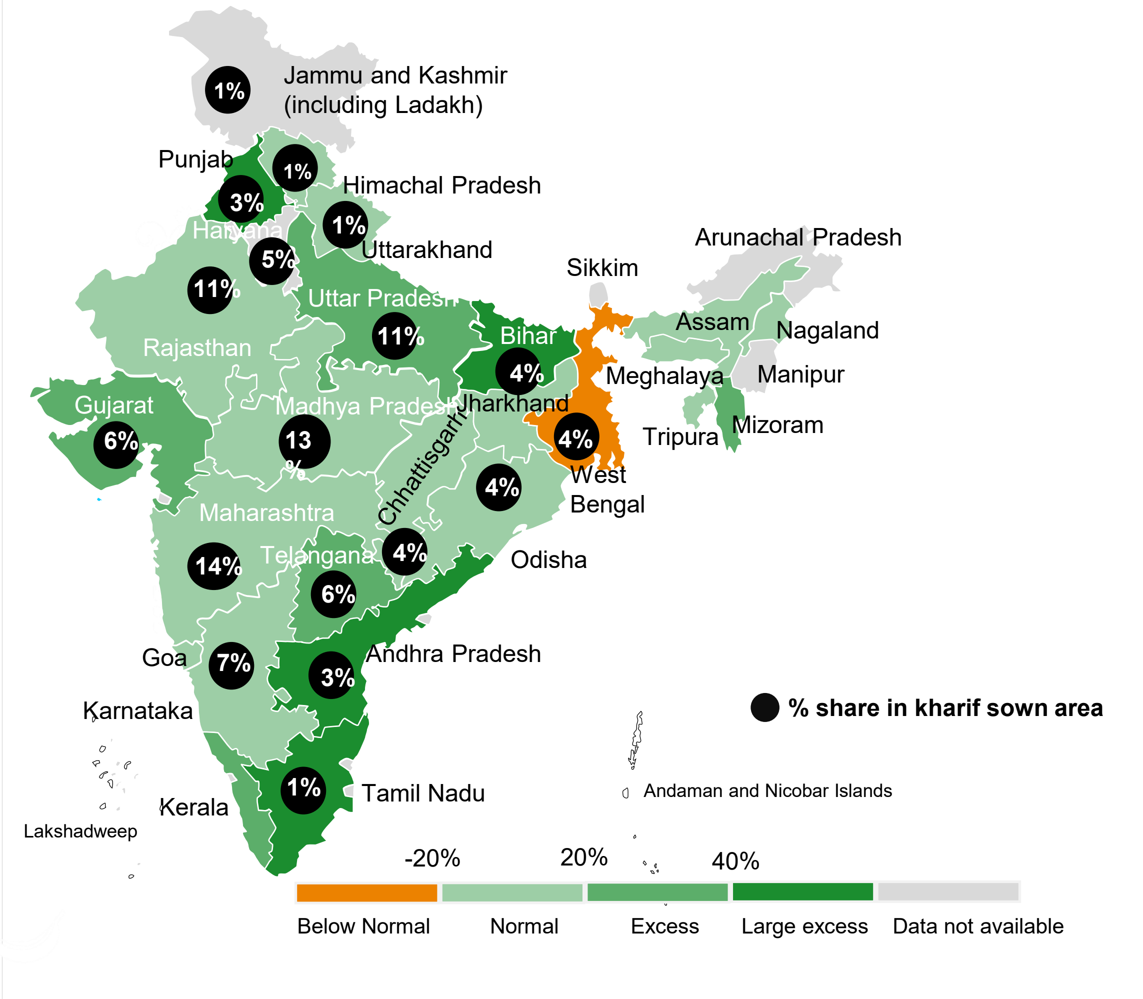
Reservoir Levels in India – August 2025

Reservoir storage at 158 BCM, up from ~148 BCM last year (7% higher)



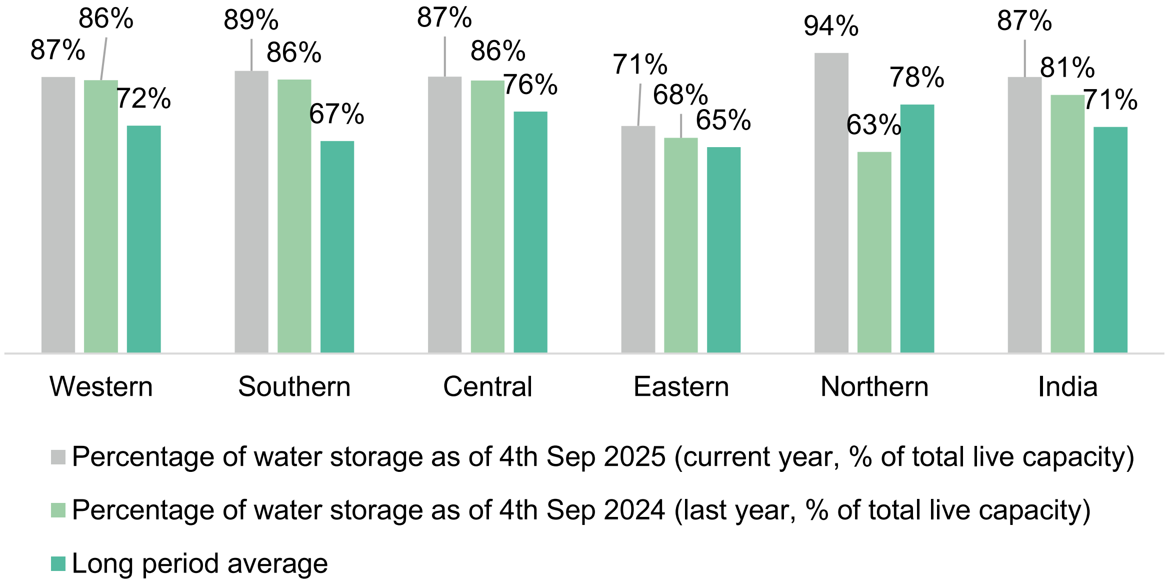
Please note that the figure presented is for illustrative purposes only

Source: Ministry of Agriculture, Crisil Intelligence

Current Storage Position

As of 4th September 2025, storage levels equal ~87% of India's total live capacity. The northern region shows the sharpest surplus over its long period average (LPA), while the eastern region records the lowest surplus over its LPA, among all regions.

Region-wise Reservoir Storage Comparison



Note: Reservoir data is the latest available as of on 4th Sep 2025, Source: Central Water Commission (CWC)

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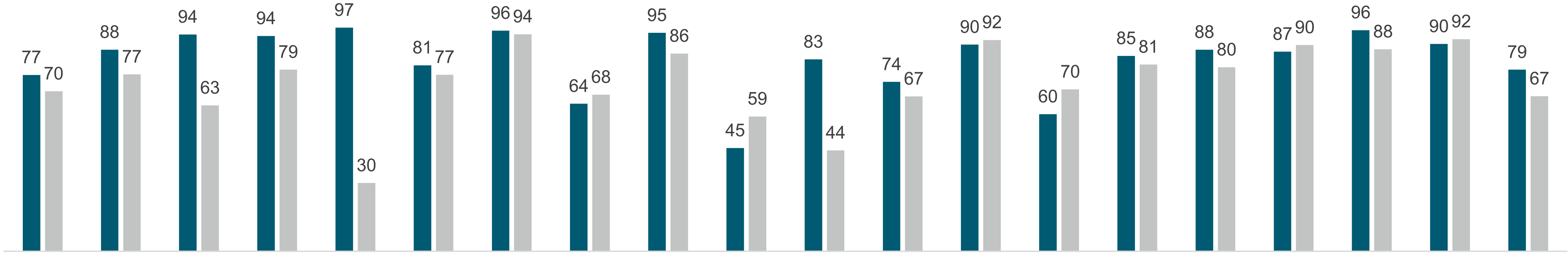
Reservoir Storage Position

West Bengal and Jharkhand below decadal average



State	% Departure from average storage levels of last 10 year	% Irrigation Penetration	Region
Uttar Pradesh	37%	86.6%	Northern Region
Uttarakhand	16%	48.8%	Northern Region
Himachal Pradesh	17%	20.3%	Northern Region
Rajasthan	20%	44.6%	Northern Region
Punjab	45%	100.0%	Northern Region
Gujarat	31%	41.1%	Western Region
Maharashtra	19%	18.7%	Western Region
Nagaland	3%	30.0%	Eastern* Region
Tripura	17%	31.4%	Eastern* Region
West Bengal	-21%	59.2%	Eastern* Region
Bihar	92%	59.2%	Eastern* Region
Odisha	13%	25.1%	Eastern* Region
Madhya Pradesh	10%	69.5%	Central Region
Jharkhand	-13%	16.0%	Central Region
Chhattisgarh	19%	32.4%	Central Region
Andhra Pradesh	58%	45.7%	Southern Region
Telangana	32%	47.5%	Southern Region
Tamil Nadu	54%	56.6%	Southern Region
Karnataka	18%	31.9%	Southern Region
Kerala	28%	19.2%	Southern Region

*1) Reservoir levels are as of 4th September 2025 2) *Odisha accounts for 87% of eastern states reservoir storage; 3) *AP and Telangana share common reservoirs between both states, though in the latest publications results were not updated. 4) FRL: Full reservoir level; The region wise categorization given above is as per Central Water Commission (CWC); Source: Central Water Commission (CWC), Crisil Intelligence*

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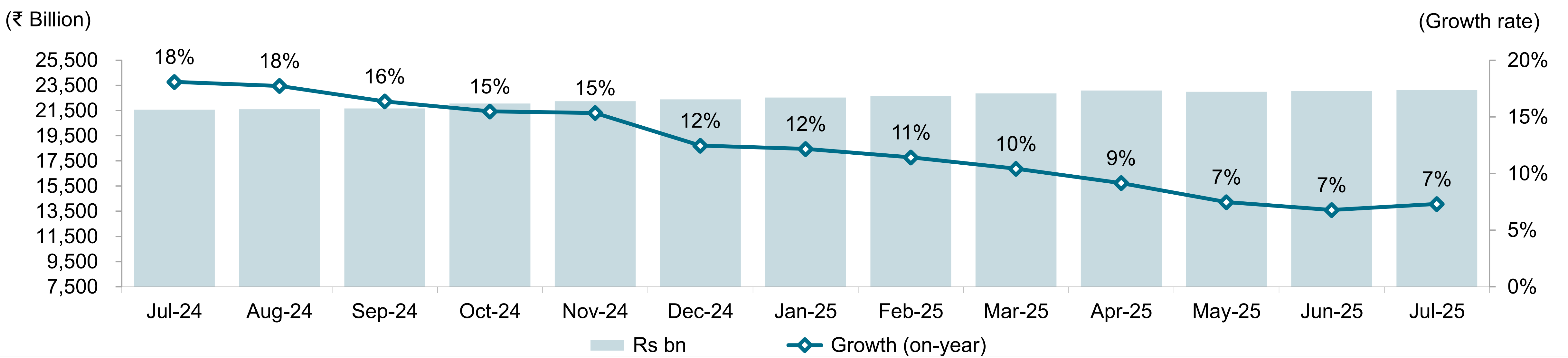
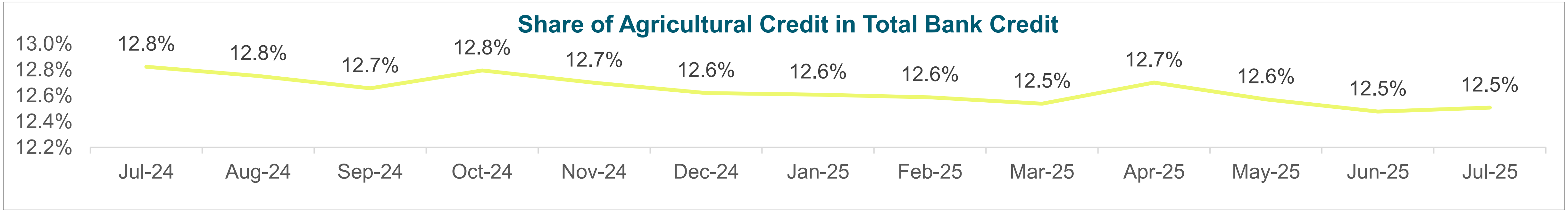
Growth in Agricultural Credit

Credit grew 7% year-on-year to 23 lakh crore, remaining steady on month in July 2025





Agricultural credit maintained a stable share in total bank credit between July 2024 and July 2025, hovering around 12.5–12.8%, reflecting consistent lending support to the sector.

1)The growth rate gives on-year growth in Agriculture Credit. 2)The agriculture credit numbers come with a lag. These are the latest available numbers.
Source: Reserve bank of India (RBI), Crisil Intelligence

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Crop situation

Crop Acreage Trends and Regional Drivers

<table>
<tr><th rowspan="3">Crop</th><th colspan="2">Crisil's estimates</th><th rowspan="3">Growth (%) on-year</th><th colspan="2">Crop Situation</th></tr>
<tr><th rowspan="2">MY 2025E (lakh ha)</th><th rowspan="2">MY 2026P (lakh ha)</th><th>Acreage Gains and Crop health</th><th>Acreage Reduction and Challenges</th></tr>
<tr></tr>
<tr><td>Paddy</td><td>418</td><td>420</td><td>0-1%</td><td>• Chhattisgarh & Odisha – Increase in acreage due to govt support, shift from sugarcane in Bihar
• AP, Telangana & TN –acreage up due to favorable monsoon; other states sowing satisfactory</td><td>• Uttarakhand, Vidarbha & Karnataka – Decrease due to land commercialization, reduced profitability, crop diversification
• Punjab and Haryana – Crop yield is expected to be impacted due floods</td></tr>
<tr><td>Jowar</td><td>15.9</td><td>15.4</td><td>2-3%</td><td rowspan="3">• Haryana & Gujarat – Increase in Bajra acreage due to govt initiatives, rising demand for millets
• Southern Karnataka – Ragi acreage remains steady</td><td rowspan="3">• Rajasthan – Decrease in Jowar Acreage lower prices in previous MY, shift towards maize
• Rajasthan – On ground interactions indicate that Bajra crop is moderately affected due to excessive rainfall</td></tr>
<tr><td>Bajra</td><td>69.2</td><td>69.6</td><td>0-1%</td></tr>
<tr><td>Ragi</td><td>9.5</td><td>9.5</td><td>0-1%</td></tr>
<tr><td>Maize</td><td>90.9</td><td>94</td><td>3-4%</td><td>• Rajasthan & MP – Increase in acreage due to shift from soybean for higher profit
• AP & Telangana – Increase in acreage as farmers move away from chilli cultivation
• Northern Karnataka – Increase due to govt initiatives</td><td>• As per the recent on-ground interaction heavy rainfall across RJ, AP and TS has marginally impacted the maize crop.</td></tr>
<tr><td>Groundnut</td><td>47.2</td><td>47.9</td><td>1-2%</td><td>• Gujarat & Tamil Nadu – Increase in acreage due to better prices
• The crop situation is healthy.</td><td>• Rajasthan – Decrease in acreage due to shift to less-water intensive crops, Excessive rainfall caused stunted growth and water logging.
• AP & Karnataka –Decrease in acreage due to poor returns</td></tr>
</table>

Color coding represents:

- Higher on-year
- Similar on-year
- Lower on-year

Note: MY denotes crop marketing year from Jul-Jun – e.g.. Kharif crops sown in Jun-August 2025 and marketed between July 2025 to June 2026 will be considered as MY2026P

Crop Acreage Trends and Regional Drivers

Crop	Crisil's estimates		Growth (%) on-year	Crop Situation	
	MY 2025E (lakh ha)	MY 2026P (lakh ha)		Acreage Gains and Crop health	Acreage Reduction and Challenges
Soybean	115.7	111.6	3-4%	• Marathwada (MH) – Increase in acreage due to crop shifts	• Rajasthan, Chhattisgarh & MP – Decrease • Heavy rainfall is reported to have impacted Rajasthan's crops.
Tur	49.7	49.2	0-1%	• Odisha – marginal Increase • Crop situation healthy	• Gujarat, Karnataka & MP – Decrease • Heavy rainfall to have resulted in flower drop and lower pod setting across RJ, UP and AP
Urad	37.9	37	2-3%		
Moong	34.5	34.2	1-2%		
Cotton	117.5	115.1	2-3%	• Andhra Pradesh & Telangana – Increase due to shift from chilli • Karnataka- Increase due to better realization • The crop situation is reported to be healthy	• Maharashtra, Gujrat, Punjab, & Haryana – Decrease due to lower realization • Flooding and heavy rainfall will cause flower drop in PB and TS. AP and RJ will see minimal impact.
Jute	6.05	5.96	1-2%	• NA	• West Bengal – decrease due to shift towards maize & paddy due to lower realization in MY25
Sugarcane	52.2	50.6	3-4%	• Tamil Nadu – Increase as acreages shift towards more profitable crops • Maharashtra- stable	• UP & Bihar – Decrease due to red rot infestation last year • Minimal impact expected across riverbanks of UP due to submergence
Total Kharif crops	1064	1060	0-1%	• Inch up in acreages of crops like paddy, bajra, maize to name a few is likely to subdue the degrowth in acreages in MY26P.	• Decline mainly due to reduction in key commercial crops like sugarcane & cotton • Heavy rainfall and flooding expected to reduce overall production

Color coding represents:

- Higher on-year
- Similar on-year
- Lower on-year

Note: MY denotes crop marketing year from Jul-Jun – e.g.. Kharif crops sown in Jun-August 2025 and marketed between July 2025 to June 2026 will be considered as MY2026P

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Crop Dynamics at a glance – Field crops

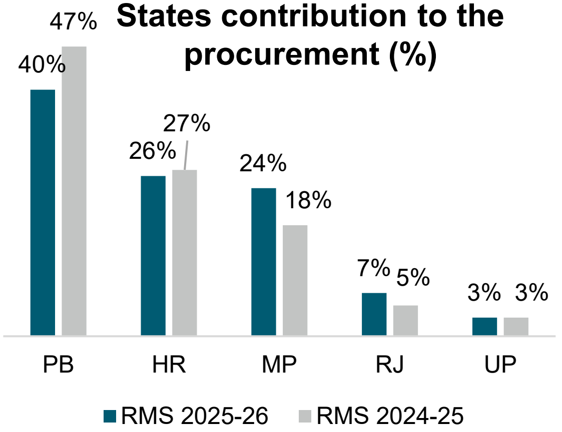
Procurement quantities highlighted in [orange] indicate ongoing procurement as of 6th September 2025. Quantities highlighted in [light blue] represent completed procurement.

Wheat

Quantity Procured in;

RMS 2025-26	~30 MMT
RMS 2024-25	~26.6 MMT

States contribution to the procurement (%)



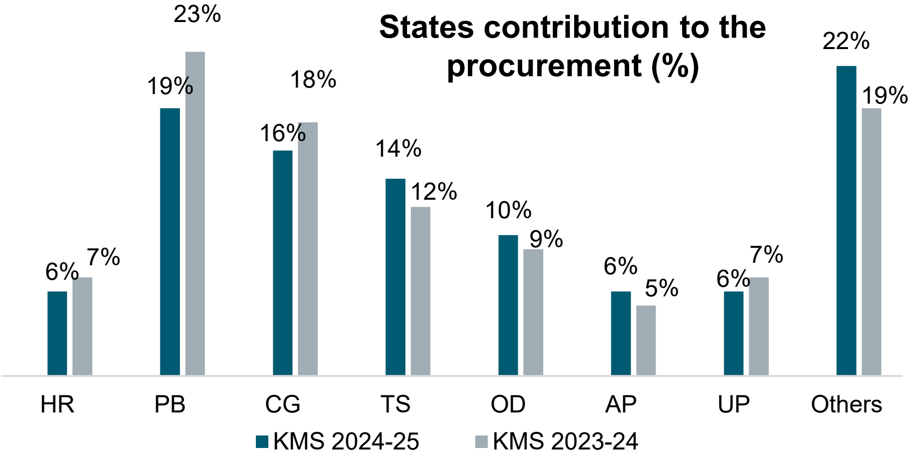
Govt target 32.3 MMT; ~92% of target achieved in RMS 2025-26

Paddy

Quantity Procured in;

KMS 2024-25	~91 MMT
KMS 2023-24	~81.6 MMT

States contribution to the procurement (%)



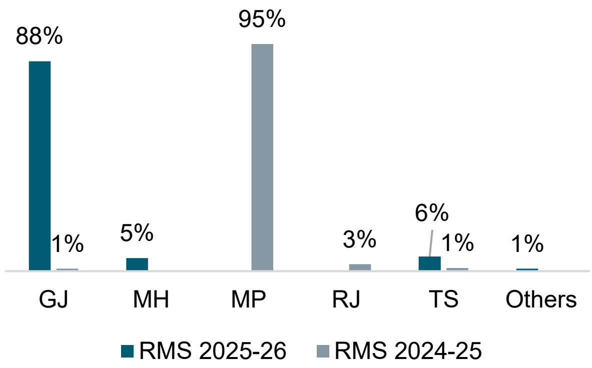
Other states contributing under KMS 2024-25 are TN (5%), MP(5%), Bihar(4%), WB(3%), and MH-AS-UK-KL (5%).

Bengal Gram

Quantity Procured in;

RMS 2025-26	~93,781 MT
RMS 2024-25	~43,320 MT

States contribution to the procurement (%)



RMS 2025-26 recorded a YoY growth of ~116% over the previous season.

- *Marketing Year (MY) refers to the sale period; for instance, kharif sown in May–Aug 2025 and marketed in Jul 2025–Jun 2026 is MY2026P, while rabi sown in Oct 2024–Jan 2025 and marketed in Jan–Dec 2025 is MY2025P. In KMS 2025, kharif procurement (Sep 2024–Jun 2025) and rabi procurement (Sep 2024–Aug 2025) remain ongoing as of 6th Sep 2025, whereas RMS 2026 wheat procurement (Mar–Jun 2025) has been completed. Both paddy and wheat procurement data is sourced from FCI. For Bengal gram, Crisil estimates indicate procurement completed (timeline not specified officially).*
- *FCI handles procurement of paddy and wheat, while NAFED procures Bengal gram.*
- *Source: Crisil Intelligence, NAFED and FCI*

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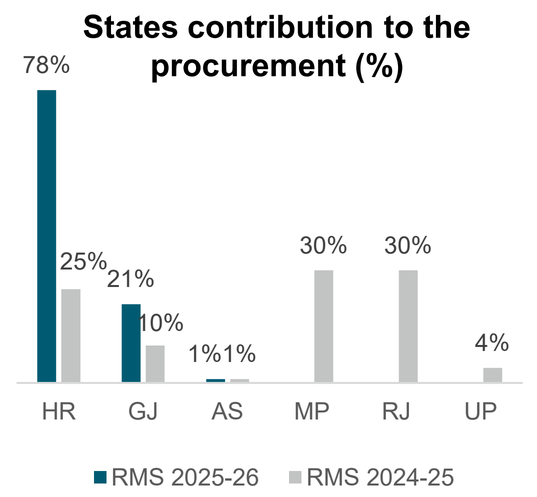
Crop Dynamics at a glance – Field crops

Procurement quantities highlighted in [orange] indicate ongoing procurement as of 6th September 2025. Quantities highlighted in [light blue] represent completed procurement.

Mustard

Quantity Procured in;

RMS 2025-26	~0.21 MMT
RMS 2024-25	~1.18 MMT

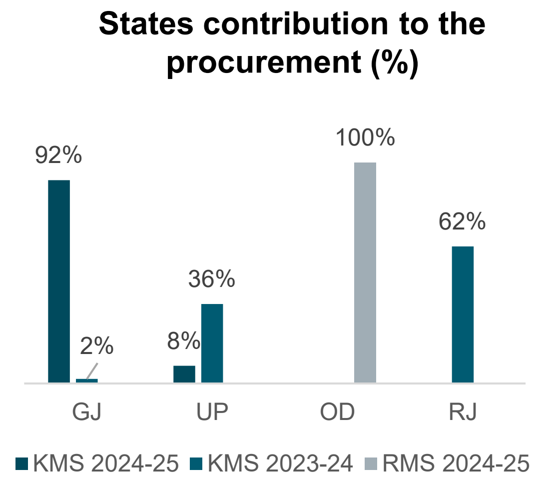


RMS 2025-26 declined by ~82% over RMS 2024-25.

Groundnut

Quantity Procured in;

KMS 2024-25	~1 MMT
KMS 2023-24	~0.07 MMT
RMS 2024-25	~1,334 MT

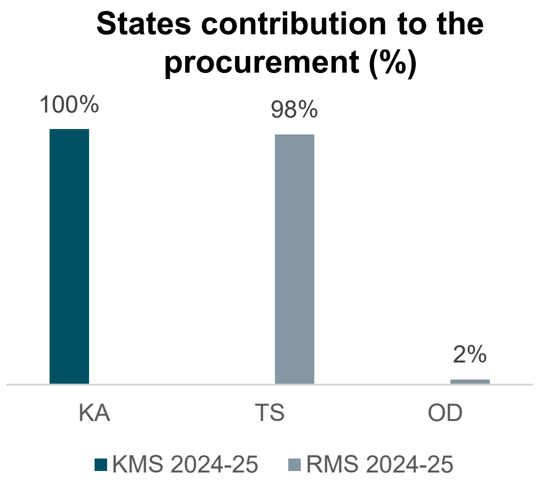


KMS 2024-25 registered a YoY growth of ~1,329%.

Sunflower

Quantity Procured in;

KMS 2024-25	~3,278 MT
RMS 2024-25	~3,799 MT

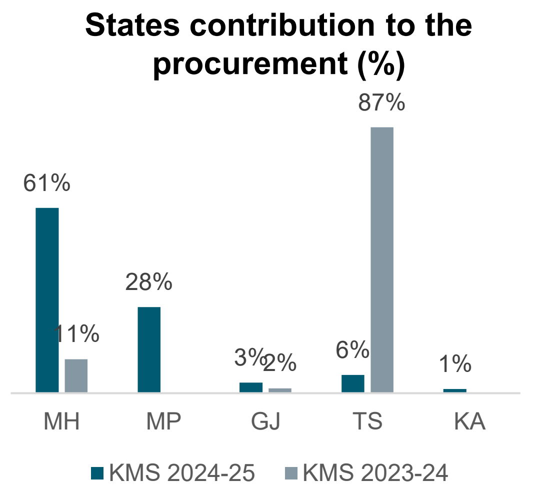


Sunflower procurement in 2024-25 was balanced across seasons.

Soybean

Quantity Procured in;

KMS 2024-25	~1.38 MMT
KMS 2023-24	~6,907 MT



KMS 2024-25 witnessed a massive YoY increase of ~18,600%.

- *MY denotes crop marketing year from Jul-Jun – e.g. Kharif crops sown in Jun-August 2024 and marketed between July 2024 to June 2025 will be considered as MY2025. For Rabi, the marketing year is from Jan-Dec- e.g. Rabi crops sown in Oct'24-Dec'24 and marketed between Jan'25 to Dec'25 will be considered as MY2025.*
- *CRISIL estimates indicate for mustard, procurement is completed, while for groundnut, sunflower, and soybean under KMS 25, procurement is ongoing (timelines not specified officially). All the mentioned procurement is handled by NAFED.*
- *Source: Crisil Intelligence, NAFED and FCI; Source: Crisil Intelligence, NAFED and FCI*

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Crop Dynamics at a glance – Horticulture crops

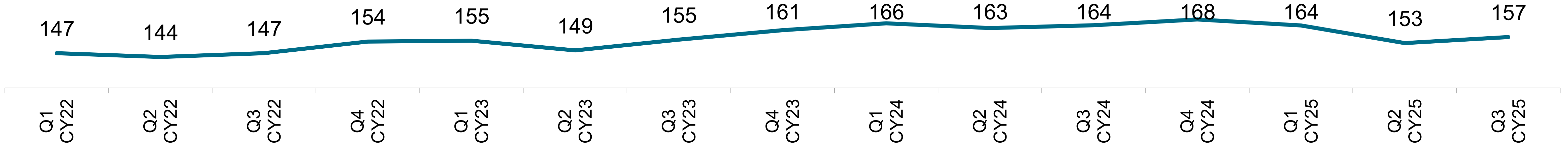
Crop	Acreage	Weather Dynamics	Price Outlook
Apple (M26P)	Acreage stable	• Kashmir -Dry spell in June but favorable rains in July led to improved ripening & color of the produce. • Incessant rainfall in August end have reportedly damaged apple orchards in the district of Shimla	Production impacted. Though amid strong demand, prices expected higher YOY
Banana (MY26P)	Acreage to rise in Maharashtra & AP (driven by G9 variety adoption, faster maturity & higher yields)	• May rainfall & winds damaged yields in Maharashtra (Nasik, Jalgaon, Dhule, Nandurbar) and TN (Thanjavur)	Prices to rise; strong processing & export demand (+38% in FY25). FY26 exports likely to surpass last year (Iran, Iraq, Uzbekistan, UK)
Tomato (Kharif MY25-26)	Acreage rising in Odisha & Chhattisgarh (shift from cole crops due to high kharif tomato prices ~45% YOY)	• Heavy August rains in key producing states of Maharashtra, Karnataka and AP have impacted arrivals. (+17%, +12%, +62% respectively) • prices +33% MOM due to low arrivals	Kharif output to be higher → prices expected lower. Fresh arrivals from western & southern states under key monitorable due to incessant rainfall in July and August
Onion (MY26P)	Acreage moderately higher on year	• Comfortable rabi stock; kharif harvest due Oct to add supply. • Incessant rainfall in RJ (+47% July-Aug) expected to impact crop if rain persists till mid Sep • Rains in Maharashtra(+11% July-Aug) have caused localized damage both in field and storage	Prices expected to moderate YoY Apr–Jul 2025 exports: 2.7 lakh Isolated shipments to Bangladesh have begun
Brinjal (MY26P)	Acreage moderately lower	• Yields steady	Lower production → prices likely to improve YOY
Okra (MY26P)	Acreage stable	• Yields improving vs last kharif (when YVMV issues hit yields)	Production to rise; prices to remain firm with steady demand
Chilli (MY26P)	Acreage down as farmers shift to maize, cotton & pulses. Hybrid seed sales weak → lower yields expected	• Cold storage utilization down (70–75% vs 80–85% last year) • Transplantation has begun in key producing states and is expected to complete in next 15 days	Lower production + firm exports (+16% in FY25) → chilli prices are expected to rise on lows of MY25

Source: Crisil Intelligence
MY denotes crop marketing year. Harvesting period varies across the crop.

Prices and Arrivals - Field crops

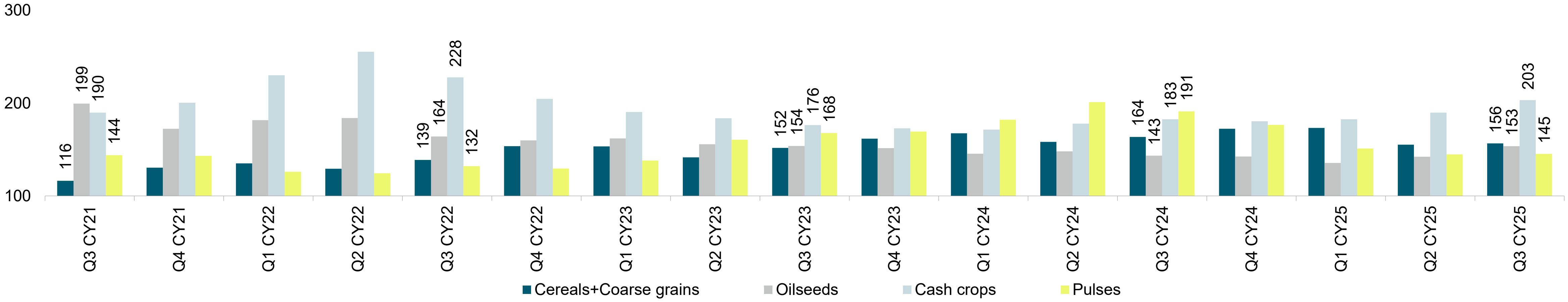
Aggregate Price Index of Field Crops

Weighted average crop price index shows a ~5% year-on-year decline in Q3 CY25 due to decline in pulses, and cereals prices



Pan India mandi prices of 14 major crops have been taken into consideration to arrive at aggregate price index.(Arhar, Bajra, Bengal Gram, Urad, Cotton, Groundnut, Jowar, Jute, Maize, Mustard, Paddy, Ragi, Soyabean, Wheat) Prices are indexed considering weights as per base year production. Q2 CY25 here represents the month of April 2025; Source: Crisil Intelligence

Price index for cash crops and oilseed inched up ~11% and ~7% respectively, while pulses and cereals price index dipped by ~24% and ~4%, respectively on-year in Q3 CY25



Note: Coarse Cereal includes bajra, jowar, ragi and maize; Oilseeds includes groundnut and soyabean; Cash crops includes cotton and jute; Pulses includes arhar and urad beans.
Q3 CY25 here represents the month of July and August 2025; Source: Crisil Intelligence

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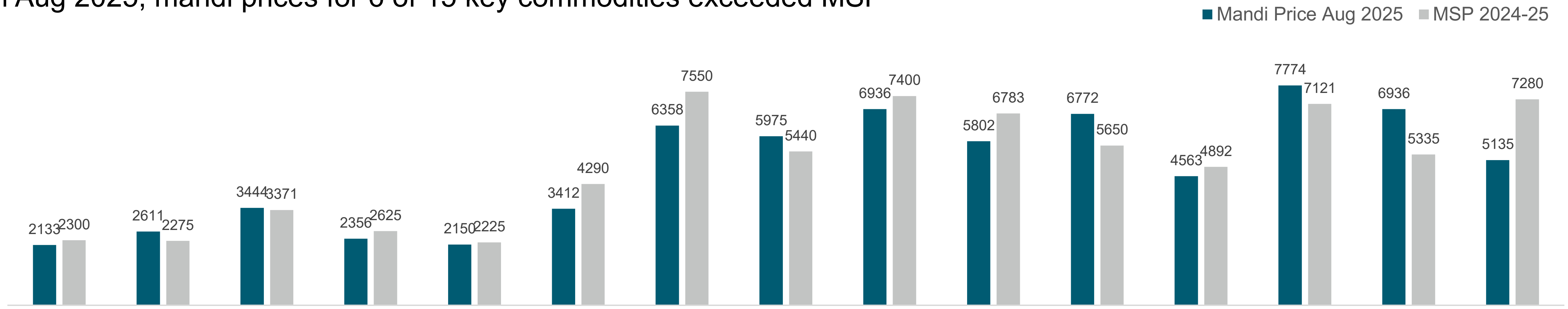
Price Trend across Key Field Crops

In Aug 2025, mandi prices for 6 of 15 key commodities exceeded MSP



	Paddy	Wheat	Jowar	Bajra	Maize	Ragi	Tur	Gram	Urad	Groundnut	Rapeseed and mustard	Soybean	Cotton	Jute	Sunflower
% change in mandi prices Aug 2025 over MSP	-7%	15%	2%	-10%	-3%	-20%	-16%	10%	-6%	-14%	20%	-7%	9%	30%	-29%
% change in prices: Aug 2025 v/s July 2025	4%	3%	4%	5%	4%	-3%	-1%	3%	5%	8%	2%	8%	0%	1%	-26%
% change in prices: Aug 2025 v/s Aug 2024	-7%	1%	13%	4%	-5%	5%	-38%	-15%	-17%	8%	23%	8%	5%	38%	14%

Mandi prices in Aug 2025 rose across 10 key crops compared to Aug 2024. Jute saw the highest increase at 38%, followed by Rapeseed & Mustard at 23%.

1) Mandi prices are weighted average prices basis daily mandi arrivals and prices; 2) Color coding represents: Green indicates higher prices, amber indicates at similar level, pink indicates decline in prices; Source: AGMARK, Crisil Intelligence

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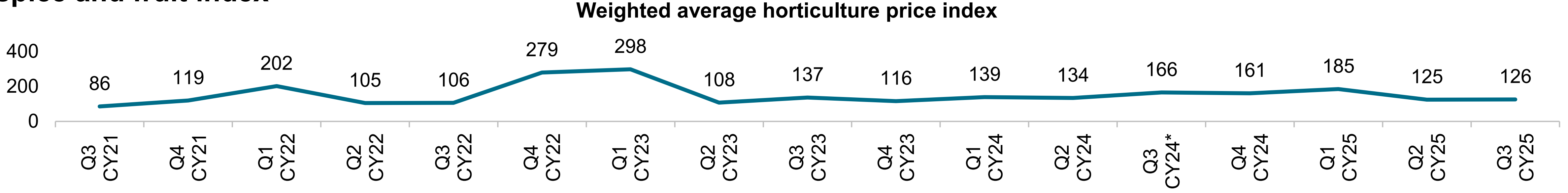
Prices and Arrivals - Horticulture crops

Aggregate Price Index of Horticulture crops

Weighted average horticulture price index for Q3 CY25 decreased by ~24% on-year due to decline across vegetable, spice and fruit index



Note: Weighted average mandi price index includes PAN India prices of Onion, Potato, Tomato, Brinjal, Green chilli, Dry chilli, Cumin, Apple, Mango, Grape and Banana accounting for ~53% of the horticulture gross sown area and ~68% of the horticulture production. Q2 CY25 here represents the month of April 2025; Source: Crisil Intelligence

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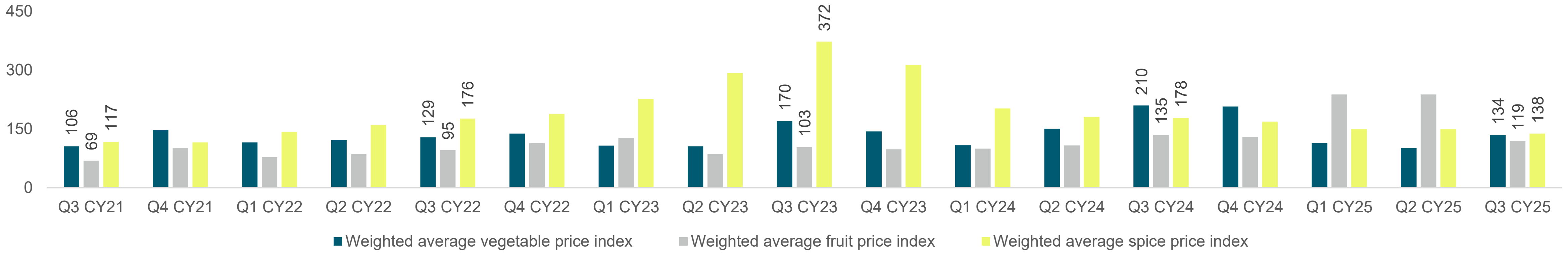
In Q3 CY25, weighted average price index for vegetable, spice and fruits declined by ~36% , ~23% and ~12% respectively on-year



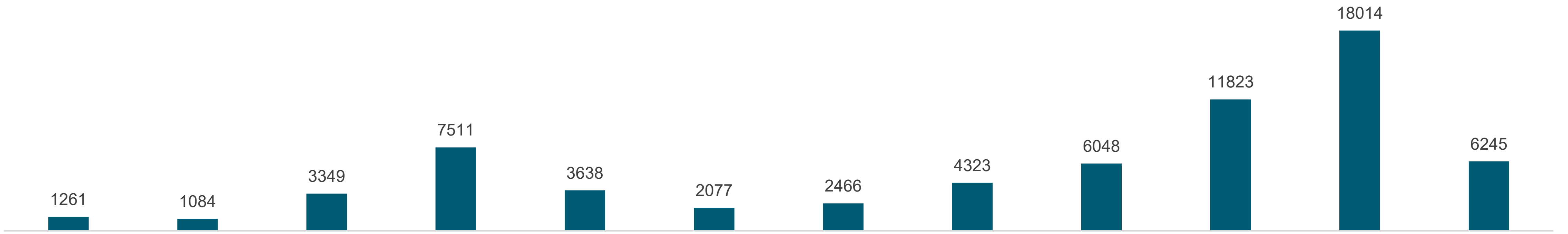
Note: Fruits include Mango, Banana, Grape and Apple, Vegetables include Onion, Potato, Tomato, Brinjal and Green chilli and Spices include cumin and dry chilli,. |
Q3 CY25 here represents the month of July and August 2025; Source: Crisil Intelligence

Price Trend across Key Horticultural Crops

Mandi prices improved on-year across 4 out of 12 crops in August 2025

■ Mandi prices Aug 2025

Mandi prices August 2025 (Rs/quintal)



	Onion	Potato	Tomato	Apple	Banana	Brinjal	Grapes	Green chillies	Mangoes	Dry chillies	Cumin	Orange
% change in prices: July 2025 v/s June 2025	7%	-9%	33%	-14%	5%	-14%	-70%	-8%	46%	1%	-2%	141%
% change in prices: July 2025 v/s July 2024	-58%	-52%	61%	-6%	-6%	-24%	-69%	13%	29%	-17%	-23%	21%

Mandi prices in July 2025 saw significant changes on month across vegetables and fruits. Orange led with a 141% increase, followed by Mango at 46%

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1) Mandi prices are weighted average prices basis daily mandi arrivals and prices 2) Color coding represents: Green indicates higher prices, amber indicates at similar level, red indicates decline in prices
Source: AGMARK, Crisil Intelligence

Exports of Key crops

Monthly export trend of key crops – Top 5 countries

RICE

Export in tonnes	Jun'25	% YoY	Apr-Jun'25	% YoY
Benin	145,291	-1%	301,071	-31%
China	27,884	3272%	83,711	4320%
Senegal	11,358	-14%	83,821	-51%
Cote D' Ivoire	40,523	114%	196,278	-15%
Saudi Arabia	98,294	10%	344,699	1%
Total	**1,519,800**	**29%**	**5,061,461**	**24%**

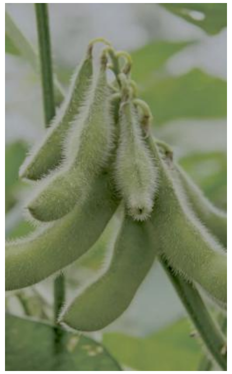
MAIZE

Export in tonnes	Jun'25	% YoY	Apr-Jun'25	% YoY
Bangladesh	0	-100%	263	-92%
Vietnam	48	NA	572	-8%
Nepal	44,578	6%	83,456	-27%
Malaysia	249	592%	738	153%
Bhutan	2,441	-18%	8,897	-27%
Total	**54,622**	**15%**	**126,575**	**-10%**

COTTON

Export in tonnes	Jun'25	% YoY	Apr-Jun'25	% YoY
Bangladesh	88,188	-17%	278,769	-6%
Senegal	16,156	-5%	46,343	12%
Sri Lanka	17,416	4%	47,177	7%
Korea	9,485	-4%	29,419	-18%
USA	9,129	18%	28,901	7%
Total	**287,000**	**-3%**	**902,155**	**-3%**

SOYBEAN



Export in tonnes	Jun'25	% YoY	Apr-Jun'25	% YoY
Nepal	427	165%	1,357	105%
UAE	114	-75%	284	-66%
Thailand	NA	NA	NA	NA
Qatar	27	73%	37	21%
Vietnam	315	NA	315	NA
Total	**928**	**43%**	**3,288**	**110%**

Colour coding represents Green indicates higher exports on year, red indicates decline in exports on year, yellow indicates data unavailable, NA- Data not available on DGFT website
Source: Ministry of Commerce and Industry

Monthly export trend of key crops – Top 5 countries

CUMIN

Export in tonnes	Jun'25	% YoY	Apr-Jun'25	% YoY
China	1,300	-48%	6,058	-68%
Bangladesh	2,146	51%	9,598	8%
Nepal	531	-33%	2,461	-14%
UAE	2,989	282%	11,337	26%
USA	1,257	22%	2,654	-2%
Total	**16,322**	**10%**	**59,248**	**-20%**

PIGEON PEA

Export in tonnes	Jun'25	% YoY	Apr-Jun'25	% YoY
USA	1,245	68%	2,760	57%
UAE	1,335	231%	3,185	356%
Canada	NA	NA	1,471	-2%
Nepal	437	449%	823	0.4%
UK	300	160%	884	63%
Total	**4,371**	**67%**	**11,701**	**64%**

GRAM

Export in tonnes	Jun'25	% YoY	Apr-Jun'25	% YoY
Bangladesh	476	-55%	1,782	-24%
UAE	1,186	-9%	14,248	416%
Iran	1,098	-47%	6,400	104%
Canada	69	-73%	351	-18%
USA	133	-34%	469	13%
Total	**3,529**	**-37%**	**25,741**	**124%**

RED CHILLI

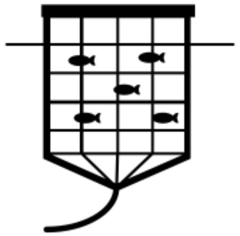
Export in tonnes	Jun'25	% YoY	Apr-Jun'25	% YoY
China	6,757	32%	119,915	350%
Bangladesh	3,070	-23%	14,216	10%
Thailand	2,784	117%	10,727	25%
Sri Lanka	3,696	48%	8,485	16%
Indonesia	1,659	-50%	6,107	64%
Total	**21,449**	**4%**	**177,157**	**142%**

Colour coding represents Green indicates higher exports on year, red indicates decline in exports on year, yellow indicates data unavailable, NA- Data not available on DGFT website
Source: Ministry of Commerce and Industry

Latest technological innovations in Indian Agriculture – 2025

Viksit Krishi Sankalp Abhiyan - Bhubaneswar

- Union Minister of Agriculture, Shri Shivraj Singh Chouhan, launched the Viksit Krishi Sankalp Abhiyan (VKSA-2025) at ICAR-CIFA, Bhubaneswar, to promote advanced agricultural and fisheries technologies nationwide.

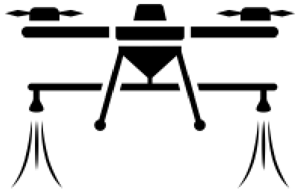


National Agri Food Biotechnology Institute

- NABI is leveraging advanced gene-editing tools like CRISPR to create crops with stronger stems, making them resistance to lodging.
- They have also developed and patented a mobile based device that can detect food poisoning bacteria withing two hours.

ICAR Scientists demonstrates drone spraying

- As a significant step towards taking modern agriculture technologies to the grass roots level, Scientists of the ICAR–Indian Institute of Vegetable Research demonstrated the use of drones for spraying zinc, pesticides and nutrients on crop in village Paniyara.



APEDA – BHARATI Initiative

- BHARATI (Bharat's Hub for Agritech, Resilience, Advancement and Incubation for Export Enablement) to empower 100 agri-food and agri-tech startups, accelerate innovation, and create new export opportunities for young entrepreneurs..

IIT Madras develops agri-waste packaging material

- Developed a packaging material from agricultural waste, presenting a sustainable alternative to traditional plastic foams used in packaging.
- Researchers demonstrated that mycelium-based bio composites, grown on agricultural and paper waste, provide high-quality packaging that is also biodegradable

Government Interventions

Government schemes/ policy amendments in agriculture – 2025-26

Pan India

MSP for Kharif 2025-26 rose ~7% YoY.

Ragi led with ~14% increase, followed by jowar (~10%) and Niger (~9%), while moong (~1%) and paddy (~3%) saw the least growth.

Pan India

The cabinet approved the Prime Minister Dhan-Dhaanya Krishi Yojana, merging 36 schemes from 11 Ministries, with an annual outlay of ₹24,000 crore for six years from 2025-26 to boost productivity and sustainable farming.

Jharkhand

NABARD to digitize 1297 Primary Agriculture Credit Societies (PACS) in **Jharkhand** in the second phase.

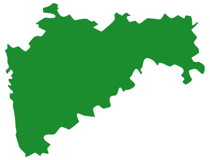
There are 4,454 PACS in the state. NABARD has computerized 1,500 PACS in the first phase.

Haryana

Country's first **Drone Manufacturing Technology Hub** is coming up in Sisai village of Hisar. It will be the largest of its kind in South Asia, offering modern facilities for drone manufacturing, repair and training

Uttar Pradesh

Uttar Pradesh will set up a vermicompost unit for cow shelters, providing earthworms, licensing, manure marketing, training, and promoting cow dung-based technologies.



Maharashtra

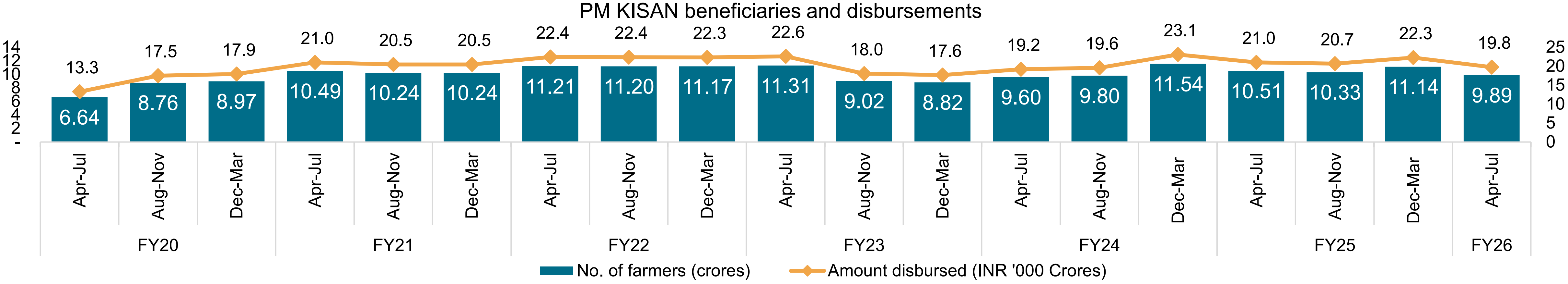
Through this this scheme, govt will invest Rs 5,000 crore scheme annually over the next five years in strengthening agri infrastructure for **Maharashtra** farmers.

Please note that the figures presented are for illustrative purposes only

Status of Central and State support schemes – Direct cash incentives

FY26's first installment released under PM Kisan is 6% lesser than that of FY25's first installment

20th installment of PM KISAN released to 9.89 crore farmers in Aug 2025



Note: Based on data published as on 6th August 2025

Strictly confidential. Not for distribution

Direct Income Support (DIS) schemes state wise

Andhra Pradesh: Rythu Bharosa
The annual investment support under this scheme has been increased from INR 13,500 to INR 20,000 by the newly formed Andhra Pradesh government.

Telangana: Rythu Bandhu
The new government plans to disburse INR 7,500 per acre per season under the new Rythu Bharosa scheme, a 50% increase over the amount paid under the earlier scheme (Rythu Bandhu).

Odisha: KALIA
Odisha replaces KALIA with CM-Kisan Yojana for farmers. The farmers would get INR 4,000 annually in two installments while landless farmers will get assistance of INR 12,500 in three installments.

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Thank You

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Crisil Intelligence is a leading provider of research, consulting, risk solutions and advanced data analytics, serving clients across government, private and public enterprises. We leverage our expertise in data-driven insights and strong benchmarking capabilities to help clients navigate complex external ecosystems, identify opportunities and mitigate risks. By combining cutting-edge analytics, machine learning and AI capabilities with deep industry knowledge, we empower our clients to make informed decisions, drive business growth and build resilient capacities.

For more information, visit Intelligence.Crisil.com

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