

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## India

### Oilseeds and Products Update

**2014**

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**Report Highlights:**

For (marketing year) MY 2014/15, total oilseed production is expected to decrease by 3.4 percent to 36.5 million metric tons (MMT) on lower *kharif* (fall and early harvested) area due to poor weather. Below-normal rains, high temperatures, and less water availability from major reservoirs reportedly slowed *kharif* (fall and early harvested) crop planting progress; this is expected to affect negatively both rainfed and irrigated crop production. MY 2014/15 total edible oil imports are estimated at 12.3 MMT, up 12 percent on competitive international prices, growing demand from middle class consumers, and lower domestic oilseed supplies.

**Post:**  
New Delhi

**Commodities:**  
Meal, Peanut  
Meal, Soybean  
Meal, Sunflowerseed  
Oil, Peanut  
Oil, Soybean  
Oil, Sunflowerseed  
Oilseed, Peanut  
Oilseed, Soybean  
Oilseed, Sunflowerseed  
Oil, Palm

**Author Defined:**

**Total Oilseed Production to Fall by 3.4 Percent due to Deficient Rainfall; Peanut Production Most Affected by Poor Monsoons**

For (marketing year) MY 2014/15 (October to September), total oilseed production is expected to decrease by 3.4 percent to 36.5 million metric tons (MMT) on lower *kharif* (fall and early harvested) area due to poor weather. Below-normal rains, high temperatures, and less water availability from major reservoirs reportedly slowed *kharif* crop planting progress; this is expected to affect negatively both rainfed and irrigated crop production.

For MY 2014/15, soybean production is unchanged at 10.6 MMT assuming normal rainfall for the rest of the planting season (August to September). For MY 2013/14, Post lowered soybean production by 4.5 percent to 10.5 MMT on inadequate rainfall. As of August 21, 2014, according to Ministry of Agriculture (MOA) statistics, total soybean acreage dropped 10 percent to 10.9 million hectares as compared to last year. Moreover, reportedly, soybean acreage fell in major growing states, such as Maharashtra and Madhya Pradesh (acreage fell by 8.2 percent and 10.4 percent), because many farmers switched to other crops on expectations of higher profit margins. These alternative crops included cotton, coarse cereals, green forage, and other vegetables.

MY 2014/15 total sunflower area and production levels are revised down to 650,000 hectares and 600,000 metric tons, respectively, on poor weather. According to the latest MOA planting report, *kharif* sunflower has only been planted on 165,000 hectares, 22 percent less than last year.

MY 2014/15 peanut area and production levels are lowered to 4.47 million hectares and 5.2 MMT, respectively, on lackluster rainfall. Because of below-normal rains in major producing states such as Gujarat and Andhra Pradesh (26 and 15 percent less acreage than last year), MOA estimates *kharif* peanut acreage at 3.5 million hectares, down 14 percent from last year.

Approximately 70 percent of peanut is produced during the *kharif* season.

According to the Indian Meteorological Department (IMD), more [rainfall](#) is expected in the coming months, which may provide relief to some rain deficient areas. However, expectations are that cumulative rainfall will be less than the long-period average, which is based on data from 1950 to 2000.

### Total Edible Oil Imports to Surge on Low Oilseed Production

For MY 2014/15, Post estimates total oilseed crush to decline five percent to 28.3 million on low oilseed production. MY 2014/15 total edible oil imports are estimated at 12.3 MMT, up 12 percent on competitive international prices, growing demand from middle class consumers, and lower domestic oilseed supplies. MY 2013/14 edible oil imports were revised up marginally to 11 MMT on higher than anticipated import pace.

### Uncompetitive Export Prices to Limit Oil Meal Exports

In MY 2014/15, total oil meal exports are lowered to 4.8 MMT on less exportable supplies and low production. For MY 2013/14, total oil meal exports (which exclude rice bran and castor meal) are revised down 17 percent to 4.4 MMT due to uncompetitive prices. Oil meal exports include 3.4 MMT of soymeal and 1 MMT of rapeseed meal. The latest oil meal trade data are available in Table-2.

**Table 1. India: Vegetable Oil Imports, 1000 Metric Tons**

	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Oct 13-Jul 14	Oct 12 - July 13	% Change
RBD palmolein	154	208	164	208	125	112	81	101	80	121	1,355	1,820	26
Crude palm oil	613	551	692	337	269	425	438	547	512	528	4,912	5,213	6
Crude palmolein	0	692	0	0	0	0	0	0	0	0	0	0	
Crude PKO	15	337	7	10	10	9	17	6	5	9	104	139	25
<b>Total palm oil</b>	<b>782</b>	<b>774</b>	<b>863</b>	<b>555</b>	<b>404</b>	<b>546</b>	<b>536</b>	<b>654</b>	<b>598</b>	<b>658</b>	<b>6,371</b>	<b>7,172</b>	<b>11</b>
Crude soy oil	97	15	54	174	96	189	113	174	100	306	1,318	818	61
Refined soy oil	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total soy oil</b>	<b>97</b>	<b>15</b>	<b>54</b>	<b>174</b>	<b>96</b>	<b>189</b>	<b>113</b>	<b>174</b>	<b>100</b>	<b>306</b>	<b>1,318</b>	<b>818</b>	<b>61</b>
Crude sun oil	120	120	107	135	58	98	170	179	155	112	1,255	827	52
Refined sun oil	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total sun oil</b>	<b>120</b>	<b>120</b>	<b>107</b>	<b>135</b>	<b>58</b>	<b>98</b>	<b>170</b>	<b>179</b>	<b>155</b>	<b>112</b>	<b>1,255</b>	<b>827</b>	<b>52</b>

Canola Rape oil	5	18	29	6	11	0	0	15	7	17	108	8	1,260
Cottonseed Oil	0	0	0	0	0	0	0	0	0	0	0	0	0
Safflower oil	1	0	0	0	0	0	0	0	0	0	1	6	83
Coconut oil	0	0	0	0	0	0	0	0	0	0	0	4	100
<b>Grand Total</b>	<b>1,005</b>	<b>927</b>	<b>1,053</b>	<b>872</b>	<b>570</b>	<b>833</b>	<b>819</b>	<b>1,022</b>	<b>861</b>	<b>1,092</b>	<b>9,053</b>	<b>8,835</b>	<b>2</b>

Source: Solvent Extractors Association of India

**Table 2. India: Oilmeal Exports, Metric Tons**

	Soybean meal	Rapeseed meal	Peanut meal	Sunflower meal	Total
Oct-13	182,724	143,848	484	0	327,056
Nov-13	503,269	27,993	162	0	531,424
Dec-13	451,314	93,144	302	0	544,760
Jan-14	364,443	55,938	295	0	420,676
Feb-14	183,550	82,294	100	0	265,944
Mar-14	223,204	95,165	0	0	318,369
Apr-14	89,883	125,872	132	0	215,887
May-14	8,226	95,847	0	0	104,073
Jun-14	2,637	99,054	0	0	101,691
Jul-14	6,635	87,637	0	0	94,272
Surface Transport	800,000		-	-	800,000
Oct 13-Jul-14	<b>2,815,885</b>	<b>906,792</b>	<b>1,475</b>	<b>0</b>	<b>3,724,152</b>
Oct 12-Jul-13	4,002,455	599,213	1,504	0	4,603,172
% Change	<b>-30</b>	51	<b>-2</b>		<b>-19</b>

Source: Solvent Extractors' Association (SEA) of India

Note: The soy meal sales include surface transport to neighbors

**Production, Supply and Demand Data Statistics:**

**Table 3. India: Commodity, Oilseed, Soybean, PSD**

Oilseed, Soybean India	2012/2013		2013/2014		2014/2015	
	Market Year Begin: Oct 2012		Market Year Begin: Oct 2013		Market Year Begin: Oct 2014	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	10,800	10,700	12,200	12,200	11,000	10,908
Area Harvested	10,800	10,700	12,200	12,000	11,000	10,908
Beginning Stocks	292	535	218	515	593	595
Production	11,500	11,200	11,000	10,500	11,000	10,600
MY Imports	0	0	0	0	0	0
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from EU	0	0	0	0	0	0
Total Supply	11,792	11,735	11,218	11,015	11,593	11,195
MY Exports	99	20	150	20	150	20
MY Exp. to EU	38	0	50	0	60	0
Crush	9,750	9,600	8,600	8,600	9,000	8,500
Food Use Dom. Cons.	600	600	625	500	650	500
Feed Waste Dom. Cons.	1,125	1,000	1,250	1,300	1,250	1,600
Total Dom. Cons.	11,475	11,200	10,475	10,400	10,900	10,600
Ending Stocks	218	515	593	595	543	575
Total Distribution	11,792	11,735	11,218	11,015	11,593	11,195
CY Imports	0	0	0	0	0	0
CY Imp. from U.S.	0	0	0	0	0	0
CY Exports	100	10	150	10	175	10
CY Exp. to U.S.	43	0	50	0	50	0

**Table 4. India: Commodity, Meal, Soybean, PSD**

Meal, Soybean India	2012/2013		2013/2014		2014/2015	
	Market Year Begin: Oct 2012		Market Year Begin: Oct 2013		Market Year Begin: Oct 2014	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	9,750	9,600	8,600	8,600	9,000	8,500
Extr. Rate, 999.9999	1.	0.8	1.	0.8936	1.	0.8935
Beginning Stocks	130	230	50	160	207	595
Production	7,800	7,680	6,880	7,685	7,200	7,595
MY Imports	7	0	7	0	7	0
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from EU	0	0	0	0	0	0
Total Supply	7,937	7,910	6,937	7,845	7,414	8,190
MY Exports	4,354	4,500	2,900	3,400	3,000	3,600
MY Exp. to EU	0	0	0	0	0	0
Industrial Dom. Cons.	0	0	0	0	0	0
Food Use Dom. Cons.	351	250	450	550	500	600
Feed Waste Dom. Cons.	3,182	3,000	3,380	3,300	3,665	3,600
Total Dom. Cons.	3,533	3,250	3,830	3,850	4,165	4,200
Ending Stocks	50	160	207	595	249	390
Total Distribution	7,937	7,910	6,937	7,845	7,414	8,190
CY Imports	7	0	7	0	7	0

CY Imp. from U.S.	0	0	0	0	0	0
CY Exports	4,435	3,800	2,950	3,800	3,000	3,800
CY Exp. to U.S.	0	0	0	0	0	0
SME	3,533	3,250	3,830	3,850	4,165	4,200

**Table 5. India: Commodity, Oil, Soybean, PSD**

Oil, Soybean India	2012/2013		2013/2014		2014/2015	
	Market Year Begin: Oct 2012		Market Year Begin: Oct 2013		Market Year Begin: Oct 2014	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	9,750	9,600	8,600	8,600	9,000	8,500
Extr. Rate, 999.9999	0.	0.176	0.	0.1797	0.	0.1794
Beginning Stocks	361	479	277	364	146	249
Production	1,740	1,690	1,540	1,545	1,610	1,525
MY Imports	1,086	1,200	1,550	1,500	1,700	1,700
MY Imp. from U.S.	10	0	2	20	2	20
MY Imp. from EU	0	0	0	0	0	0
Total Supply	3,187	3,369	3,367	3,409	3,456	3,474
MY Exports	0	5	1	10	0	0
MY Exp. to EU	0	0	0	0	0	0
Industrial Dom. Cons.	0	0	0	0	0	0
Food Use Dom. Cons.	2,910	3,000	3,220	3,150	3,300	3,200

Feed Waste Dom. Cons.	0	0	0	0	0	0
-	0	0	0	0	0	0
Total Dom. Cons.	2,910	3,000	3,220	3,150	3,300	3,200
Ending Stocks	277	364	146	249	156	274
Total Distribution	3,187	3,369	3,367	3,409	3,456	3,474
CY Imports	1,120	958	1,600	1,000	1,700	1,100
CY Imp. from U.S.	10	113	2	15	2	15
CY Exports	0	0	1	0	0	0
CY Exp. to U.S.	0	0	0	0	0	0

**Table 6. India: Commodity, Oilseed, Peanut, PSD**

Oilseed, Peanut India	2012/2013		2013/2014		2014/2015	
	Market Year Begin: Oct 2012		Market Year Begin: Oct 2013		Market Year Begin: May 2014	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	5,000	4,900	5,400	5,250	5,200	4,150
Area Harvested	5,000	4,900	5,400	5,250	5,200	4,150
Beginning Stocks	112	57	20	162	141	112
Production	5,000	4,400	5,650	6,300	5,450	4,900
MY Imports	3	0	1	0	1	0
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from EU	0	0	0	0	0	0
Total Supply	5,115	4,457	5,671	6,462	5,592	5,012
MY Exports	525	395	750	650	625	500

MY Exp. to EU	20	2	20	2	20	2
Crush	3,575	3,300	3,700	4,600	3,880	3,500
Food Use Dom. Cons.	615	350	630	600	600	400
Feed Waste Dom. Cons.	380	250	450	500	375	450
Total Dom. Cons.	4,570	3,900	4,780	5,700	4,855	4,350
Ending Stocks	20	162	141	112	112	162
Total Distribution	5,115	4,457	5,671	6,462	5,592	5,012
CY Imports	3	0	1	0	1	0
CY Imp. from U.S.	0	0	0	0	0	0
CY Exports	640	656	750	477	725	400
CY Exp. to U.S.	0	0	0	0	0	0

**Table 7. India: Commodity, Meal, Peanut, PSD**

Meal, Peanut India	2012/2013		2013/2014		2014/2015	
	Market Year Begin: Oct 2012		Market Year Begin: Oct 2013		Market Year Begin: May 2014	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	3,575	3,300	3,700	4,600	3,880	3,500
Extr. Rate, 999.9999	0.	0.4	0.	0.4	0.	0.32
Beginning Stocks	0	0	0	0	0	0
Production	1,400	1,320	1,445	1,840	1,525	1,120
MY Imports	0	0	0	0	0	0
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from	0	0	0	0	0	0

EU						
Total Supply	1,400	1,320	1,445	1,840	1,525	1,120
MY Exports	15	2	10	2	10	2
MY Exp. to EU	0	0	0	0	0	0
Industrial Dom. Cons.	0	0	0	0	0	0
Food Use Dom. Cons.	5	10	5	26	5	18
Feed Waste Dom. Cons.	1,380	1,308	1,430	1,812	1,510	1,100
Total Dom. Cons.	1,385	1,318	1,435	1,838	1,515	1,118
Ending Stocks	0	0	0	0	0	0
Total Distribution	1,400	1,320	1,445	1,840	1,525	1,120
CY Imports	0	0	0	0	0	0
CY Imp. from U.S.	0	0	0	0	0	0
CY Exports	7	2	10	2	10	3
CY Exp. to U.S.	0	0	0	0	0	0
SME	1,557	1,481	1,613	2,066	1,703	1,257

**Table 8: Commodity, Oil, Peanut, PSD**

Oil, Peanut India	2012/2013		2013/2014		2014/2015	
	Market Year Begin: Oct 2012		Market Year Begin: Oct 2013		Market Year Begin: Oct 2014	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	3,575	3,300	3,700	4,600	3,880	3,500
Extr. Rate, 999.9999	0.	0.34	0.	0.34	0.	0.34

Beginning Stocks	21	81	10	139	11	478
Production	1,180	1,122	1,220	1,564	1,285	1,190
MY Imports	0	0	0	0	0	0
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from EU	0	0	0	0	0	0
Total Supply	1,201	1,203	1,230	1,703	1,296	1,668
MY Exports	4	4	4	10	5	15
MY Exp. to EU	0	0	0	0	0	0
Industrial Dom. Cons.	10	10	10	15	10	25
Food Use Dom. Cons.	1,177	1,050	1,205	1,200	1,270	1,350
Feed Waste Dom. Cons.	0	0	0	0	0	0
Total Dom. Cons.	1,187	1,060	1,215	1,215	1,280	1,375
Ending Stocks	10	139	11	478	11	278
Total Distribution	1,201	1,203	1,230	1,703	1,296	1,668
CY Imports	0	0	0	0	0	0
CY Imp. from U.S.	0	0	0	0	0	0
CY Exports	3	0	4	0	0	0
CY Exp. to U.S.	0	0	0	0	0	0

**Table 9. India: Commodity, Oilseed, Sunflower seed PSD**

Oilseed, Sunflowerseed India	2012/2013		2013/2014		2014/2015	
	Market Year Begin: Oct 2012		Market Year Begin: Oct 2013		Market Year Begin: May 2014	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	800	810	830	685	830	650
Area Harvested	800	810	750	680	730	650
Beginning Stocks	0	0	0	0	0	0
Production	700	620	670	600	650	600
MY Imports	0	0	0	0	0	0
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from EU	0	0	0	0	0	0
Total Supply	700	620	670	600	650	600
MY Exports	4	0	4	0	4	0
MY Exp. to EU	0	0	0	0	0	0
Crush	620	520	585	520	560	520
Food Use Dom. Cons.	0	0	0	0	0	0
Feed Waste Dom. Cons.	76	100	81	80	86	80
Total Dom. Cons.	696	620	666	600	646	600
Ending Stocks	0	0	0	0	0	0
Total Distribution	700	620	670	600	650	600
CY Imports	0	0	0	0	0	0
CY Imp. from U.S.	0	0	0	0	0	0
CY Exports	4	0	4	0	4	0
CY Exp. to U.S.	0	0	0	0	0	0

**Table 10. India: Commodity, Meal, Sunflower seed, PSD**

Meal, Sunflowerseed India	2012/2013		2013/2014		2014/2015	
	Market Year Begin: Oct 2012		Market Year Begin: Oct 2013		Market Year Begin: May 2014	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	620	520	585	520	560	520
Extr. Rate, 999.9999	0.	0.4808	0.	0.4808	0.	0.4808
Beginning Stocks	0	0	0	0	0	0
Production	294	250	280	250	265	250
MY Imports	0	0	0	0	0	0
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from EU	0	0	0	0	0	0
Total Supply	294	250	280	250	265	250
MY Exports	0	0	0	0	0	0
MY Exp. to EU	0	0	0	0	0	0
Industrial Dom. Cons.	0	0	0	0	0	0
Food Use Dom. Cons.	0	0	0	0	0	0
Feed Waste Dom. Cons.	294	250	280	250	265	250
Total Dom. Cons.	294	250	280	250	265	250
Ending Stocks	0	0	0	0	0	0
Total Distribution	294	250	280	250	265	250
CY Imports	0	0	0	0	0	0
CY Imp. from U.S.	0	0	0	0	0	0
CY Exports	0	0	0	0	0	0
CY Exp. to U.S.	0	0	0	0	0	0
SME	278	236	264	236	250	236

**Table 11. India: Commodity, Oil, Sunflowerseed, PSD**

Oil, Sunflowerseed India	2012/2013		2013/2014		2014/2015	
	Market Year Begin: Oct 2012		Market Year Begin: Oct 2013		Market Year Begin: May 2014	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	620	520	585	520	560	520
Extr. Rate, 999.9999	0.	0.3615	0.	0.3615	0.	0.3615
Beginning Stocks	137	444	114	272	172	310
Production	220	188	210	188	200	188
MY Imports	939	940	1,550	1,450	1,600	1,600
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from EU	0	0	0	0	0	0
Total Supply	1,296	1,572	1,874	1,910	1,972	2,098
MY Exports	2	0	2	0	2	0
MY Exp. to EU	0	0	0	0	0	0
Industrial Dom. Cons.	0	0	0	0	0	0
Food Use Dom. Cons.	1,180	1,300	1,700	1,600	1,850	1,700
Feed Waste Dom. Cons.	0	0	0	0	0	0
Total Dom. Cons.	1,180	1,300	1,700	1,600	1,850	1,700
Ending Stocks	114	272	172	310	120	398
Total Distribution	1,296	1,572	1,874	1,910	1,972	2,098
CY Imports	1,084	1,078	1,550	1,084	1,600	1,200
CY Imp. from U.S.	0	0	0	0	0	0
CY Exports	0	0	0	0	0	0
CY Exp. to U.S.	0	0	0	0	0	0

**Table 12. India: Commodity, Oil, Palm, PSD**

Oil, Palm India	2012/2013		2013/2014		2014/2015	
	Market Year Begin: Oct 2012		Market Year Begin: Oct 2013		Market Year Begin: Oct 2014	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Trees	0	0	0	0	0	0
Beginning Stocks	669	218	802	718	502	298
Production	50	75	50	80	50	80
MY Imports	8,308	8,350	8,000	8,000	8,650	9,000
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from EU	0	0	0	0	0	0
Total Supply	9,027	8,643	8,852	8,798	9,202	9,378
MY Exports	0	0	0	0	0	0
MY Exp. to EU	0	0	0	0	0	0
Industrial Dom. Cons.	325	325	350	350	400	400
Food Use Dom. Cons.	7,900	7,600	8,000	8,150	8,410	8,600
Feed Waste Dom. Cons.	0	0	0	0	0	0
Total Dom. Cons.	8,225	7,925	8,350	8,500	8,810	9,000
Ending Stocks	802	718	502	298	392	378
Total Distribution	9,027	8,643	8,852	8,798	9,202	9,378
CY Imports	8,478	7,100	8,200	7,100	8,700	7,100
CY Imp. from U.S.	0	0	0	0	0	0
CY Exports	0	0	0	0	0	0
CY Exp. to U.S.	0	0	0	0	0	0

