

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## India

### Oilseeds and Products Update

**September 2013**

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**Report Highlights:**

For MY 2012/13 (October-September), soybeans, peanuts and sunflower were planted on 16.5 million hectares, up 15 percent over last year. Normal to excess rains in all major oilseed growing regions coupled with strong oilseed prices encouraged higher planting in *khariif* 2013. Soybean production is estimated at a record 13.5 million tons, up 2.3 million tons over last year. However, lack of sunshine and dry weather during the last few weeks could lower overall yields and temper the soybean production prospects. Edible oil imports and oilmeal exports are projected at 10.7 million tons and 5.4 million tons, respectively.

**Post:**

New Delhi

**Author Defined:****Timely Rains and Strong Oilseed Prices Boosted *Kharif* Oilseed Planting**

According to the latest progressive planting report from the Government of India (GOI) Ministry of Agriculture, for MY 2012/13 (October-September) *kharif* (fall and early harvest) oilseeds (soybean, peanut and sunflower) were planted on 16.5 million hectares, up 15 percent over last year. Normal to excess rainfall in all major oilseed growing regions coupled with strong oilseed prices encouraged farmers to plant additional oilseeds acreage. .

MY 2013/14 **soybean** area reached an all-time-high of 12.2 million hectares [1] , up 1.5 million hectares from last year. Timely arrival of monsoon rainfall and strong domestic prices (100% higher than last year) encouraged some farmers to plant soybeans in lieu of other less profitable crops, such as cotton, millet and sorghum, in Madhya Pradesh and Maharashtra. Based on preliminary field assessments, MY 2012/13 soybean production is projected at 13.5 million tons, up 1.5 million tons over previous estimate (see GAIN IN3034).

Concurrently, reports of crop loss on account of heavy rainfall in central and eastern Madhya Pradesh and the Vidarbha region of Maharashtra will be partially offset by higher total planted area, but industry experts believe that a lack of sunshine and dry weather during the last few weeks could lower overall yields and eventually temper production prospects. Weather conditions in September will be a major factor in determining yields.

For MY 2013/14, total sunflower area and production are forecast to rise 5% and 17% to 850,000 hectares and 725,000 tons, on expectations of higher *kharif* acreage and normal growing conditions during the 2013 *rabi* (winter sown) season. According to the latest planting report from the Ministry of Agriculture (MoA), sunflowers have been planted on 241,000 hectares, up 55,000 hectares compared to last year.

Similarly, for MY 2013/14, total peanut area and production are projected to rise 10% and 36% to 5.4 million hectares and 6 million tons on farmer expectations of relatively higher profit margins than other competing crops such as cotton, particularly in the state of Gujarat. The latest MoA planting report estimates *kharif* peanut acreage at 4.1 million hectares, up 15 percent over last year.

**Edible Oil Imports**

During the first 10 months of MY 2012/13, total vegetable oil imports were up 11 percent to 8.8 million tons (Table 1). By the end of September 2013, India is likely to import an additional estimated 1.9 million tons of vegetable oil, bringing total edible oil imports to a record 10.7 million, up 18 percent over last year. Based on current vegetable oil imports include 8.4 million tons of palm oil, 1.2 million tons of soybean oil, 1.1 million tons of sunflower seed oil, and 3,000 tons of other edible oils. MY

2013/14 vegetable oil imports are projected to grow 8.4 percent to 1.6 million tons, of which 80 percent is likely to be palm oil, driven by population growth and rising income levels.

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

	Oct-12	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Oct 12-June 13	Oct 11-June-12	% Change
RBD palmolein	62	77	137	153	116	137	253	374	296	214	1,820	1,441	26
Crude palm oil	768	535	636	721	670	559	234	382	354	354	5,213	4,372	19
Crude palmolein	0	636	0	0	0	0	0	0	0	0	0	1	
Crude PKO	10	721	17	19	19	12	11	16	21	9	139	93	50
<b>Total palm oil</b>	<b>840</b>	<b>615</b>	<b>791</b>	<b>893</b>	<b>805</b>	<b>708</b>	<b>499</b>	<b>772</b>	<b>671</b>	<b>578</b>	<b>7,172</b>	<b>5,907</b>	<b>21</b>
Crude soy oil	92	14	22	103	63	47	51	52	139	235	818	1,004	19
Refined soy oil	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total soy oil</b>	<b>92</b>	<b>14</b>	<b>22</b>	<b>103</b>	<b>63</b>	<b>47</b>	<b>51</b>	<b>52</b>	<b>139</b>	<b>235</b>	<b>818</b>	<b>1,004</b>	<b>19</b>
Crude sun oil	86	48	69	130	84	91	88	68	101	62	827	965	14
Refined sun oil	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total sun oil</b>	<b>86</b>	<b>48</b>	<b>69</b>	<b>130</b>	<b>84</b>	<b>91</b>	<b>88</b>	<b>68</b>	<b>101</b>	<b>62</b>	<b>827</b>	<b>965</b>	<b>14</b>
Canola Rape oil	0	0	2	6	0	0	0	0	0	0	8	98	92
Cottonseed Oil	0	0	0	0	0	0	0	0	0	0	0	1	0
Safflower oil	0	0	0	0	2	4	0	0	0	0	6	5	10
Coconut oil	0	0	0	0	0	1	3	0	0	0	4	1	300
<b>Grand Total</b>	<b>1,018</b>	<b>676</b>	<b>883</b>	<b>1,133</b>	<b>954</b>	<b>851</b>	<b>641</b>	<b>892</b>	<b>911</b>	<b>875</b>	<b>8,835</b>	<b>7,981</b>	<b>11</b>

Source: Solvent Extractors Association of India

## Oil Meals

For MY 2012/13, the oilmeal [2] exports are estimated at 5.4 million tons. India generally exports what it produces on an annual basis. Exportable supplies were unchanged from last year due to similar oilseed production levels. The export basket includes 4.5 million tons of soymeal (includes surface transport to neighboring countries), 0.95 million tons of rapeseed meal and smaller quantities of other meals. During the first ten months of MY 2012/13, oil meal exports were down 16 percent to 3.7 million tons (Table 2). MY 2013/14 oilmeal exports are projected at 6 million tons, up 10 percent over last year on higher oilseed production and competitive export prices.

**Table 2. India: Oilmeal Exports (Metric Tons)**

	<b>Soybean meal</b>	<b>Rapeseed meal</b>	<b>Peanut meal</b>	<b>Sunflower meal</b>	<b>Total</b>
Oct-12	49,840	39,058	0	0	88,898
Nov-12	517,103	66,966	0	0	584,069
Dec-12	516,456	26,590	0	0	521,046
Jan-13	650,434	69,990	0	0	689,783
Feb-13	581,606	45,656	0	0	627,262
Mar-13	302,131	83,492	0	0	385,623
Apr-13	99,451	54,077	0	0	153,528
May-13	96,492	88,284	0	0	184,776
Jun-13	213,564	84,198	0	0	297,762
Jul-13	107,038	40,902	0	0	147,940
<b>Oct 12-Jul-13</b>	<b>3,134,115</b>	<b>599,213</b>	<b>0</b>	<b>0</b>	<b>3,733,328</b>
Oct 11-Jul-12	3,742,105	718,666	247	0	4,461,018
% Change	<b>-16</b>	<b>-17</b>	-	-	<b>-16</b>

Source: Solvent Extractors' Association (SEA) of India

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

Oilseed, Soybean India	2011/2012		2012/2013		2013/2014		
	Market Year Begin: Oct 2011		Market Year Begin: Oct 2012		Market Year Begin: Oct 2013		
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post	
Area Planted	10,300	10,270	10,800	10,700	12,000	12,150	(1000 HA)
Area Harvested	10,270	10,270	10,800	10,700	11,900	12,000	(1000 HA)
Beginning Stocks	505	705	316	535	391	515	(1000 MT)
Production	11,000	11,000	11,500	11,200	12,300	13,500	(1000 MT)
MY Imports	0	0	0	0	0	0	(1000 MT)
MY Imp. from U.S.	0	0	0	0	0	0	(1000 MT)
MY Imp. from EU	0	0	0	0	0	0	(1000 MT)
Total Supply	11,505	11,705	11,816	11,735	12,691	14,015	(1000 MT)
MY Exports	39	20	75	20	75	20	(1000 MT)
MY Exp. to EU	0	0	0	0	0	0	(1000 MT)
Crush	9,600	9,600	9,700	9,600	10,000	11,500	(1000 MT)
Food Use Dom. Cons.	550	550	600	600	650	700	(1000 MT)
Feed Waste Dom. Cons.	1,000	1,000	1,050	1,000	1,100	1,200	(1000 MT)
Total Dom. Cons.	11,150	11,150	11,350	11,200	11,750	13,400	(1000 MT)
Ending Stocks	316	535	391	515	866	595	(1000 MT)
Total Distribution	11,505	11,705	11,816	11,735	12,691	14,015	(1000 MT)
CY Imports	0	0	0	0	0	0	(1000 MT)
CY Imp. from U.S.	0	0	0	0	0	0	(1000 MT)
CY Exports	50	10	75	0	75	10	(1000 MT)
CY Exp. to U.S.	0	0	0	0	0	0	(1000 MT)
TS=TD		0		0		0	

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

Meal, Soybean India	2011/2012		2012/2013		2013/2014		
	Market Year Begin: Oct 2011		Market Year Begin: Oct 2012		Market Year Begin: May 2013		
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post	
Crush	9,600	9,600	9,700	9,600	10,000	11,500	(1000 MT)
Extr. Rate, 999.9999	1.	0.8	1.	0.8	1.	0.8932	(PERCENT)
Beginning Stocks	140	325	105	230	271	110	(1000 MT)
Production	7,680	7,680	7,760	7,680	8,000	10,270	(1000 MT)
MY Imports	6	65	8	0	6	0	(1000 MT)
MY Imp. from U.S.	0	0	0	0	0	0	(1000 MT)
MY Imp. from EU	0	0	0	0	0	0	(1000 MT)
Total Supply	7,826	8,070	7,873	7,910	8,277	10,430	(1000 MT)
MY Exports	4,391	4,540	3,900	4,650	3,950	5,500	(1000 MT)
MY Exp. to EU	0	0	0	0	0	0	(1000 MT)
Industrial Dom. Cons.	0	0	0	0	0	0	(1000 MT)
Food Use Dom. Cons.	330	300	352	250	370	500	(1000 MT)
Feed Waste Dom. Cons.	3,000	3,000	3,350	2,900	3,700	3,800	(1000 MT)
Total Dom. Cons.	3,330	3,300	3,702	3,150	4,070	4,300	(1000 MT)
Ending Stocks	105	230	271	110	257	630	(1000 MT)
Total Distribution	7,826	8,070	7,873	7,910	8,277	10,430	(1000 MT)
CY Imports	6	0	8	0	0	0	(1000 MT)
CY Imp. from U.S.	0	0	0	0	0	0	(1000 MT)
CY Exports	3,953	3,665	3,950	3,800	3,950	4,800	(1000 MT)
CY Exp. to U.S.	0	0	0	0	0	0	(1000 MT)
SME	3,330	3,300	3,702	3,150	4,070	4,000	(1000 MT)
TS=TD		0		0		0	

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

Oil, Soybean India	2011/2012		2012/2013		2013/2014		
	Market Year Begin: Oct 2011		Market Year Begin: Oct 2012		Market Year Begin: Oct 2013		
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post	
Crush	9,600	9,600	9,700	9,600	10,000	11,500	(1000 MT)
Extr. Rate, 999.9999	0.	0.176	0.	0.176	0.	0.1796	(PERCENT)
Beginning Stocks	237	317	361	479	240	364	(1000 MT)
Production	1,710	1,690	1,730	1,690	1,780	2,065	(1000 MT)
MY Imports	1,174	1,173	1,150	1,200	1,250	1,300	(1000 MT)
MY Imp. from U.S.	2	10	10	0	2	20	(1000 MT)
MY Imp. from EU	0	0	0	0	0	0	(1000 MT)
Total Supply	3,121	3,180	3,241	3,369	3,270	3,729	(1000 MT)
MY Exports	10	1	1	5	1	10	(1000 MT)
MY Exp. to EU	0	0	0	0	0	0	(1000 MT)
Industrial Dom. Cons.	0	0	0	0	0	0	(1000 MT)
Food Use Dom. Cons.	2,750	2,700	3,000	3,000	3,100	3,300	(1000 MT)
Feed Waste Dom. Cons.	0	0	0	0	0	0	(1000 MT)
-	0	0	0	0	0	0	(1000 MT)
Total Dom. Cons.	2,750	2,700	3,000	3,000	3,100	3,300	(1000 MT)
Ending Stocks	361	479	240	364	169	419	(1000 MT)
Total Distribution	3,121	3,180	3,241	3,369	3,270	3,729	(1000 MT)

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CY Imports	1,100	1,176	1,200	1,100	1,250	1,200	(1000 MT)
CY Imp. from U.S.	2	10	10	113	2	15	(1000 MT)
CY Exports	1	0	1	0	1	0	(1000 MT)
CY Exp. to U.S.	0	0	0	0	0	0	(1000 MT)
TS=TD		0		0		0	

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

Oilseed, Peanut India	2011/2012		2012/2013		2013/2014		
	Market Year Begin: May 2011		Market Year Begin: May 2012		Market Year Begin: May 2013		
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post	
Area Planted	5,300	5,300	5,000	4,900	5,000	5,400	(1000 HA)
Area Harvested	5,300	5,300	5,000	4,900	5,000	5,400	(1000 HA)
Beginning Stocks	174	47	90	57	73	107	(1000 MT)
Production	5,500	5,800	5,000	4,400	5,000	6,000	(1000 MT)
MY Imports	0	0	0	0	0	0	(1000 MT)
MY Imp. from U.S.	0	0	0	0	0	0	(1000 MT)
MY Imp. from EU	0	0	0	0	0	0	(1000 MT)
Total Supply	5,674	5,847	5,090	4,457	5,073	6,107	(1000 MT)
MY Exports	1,059	790	427	450	500	700	(1000 MT)

							MT)
MY Exp. to EU	20	1	20	2	20	2	(1000 MT)
Crush	3,500	4,200	3,575	3,300	3,400	4,400	(1000 MT)
Food Use Dom. Cons.	625	450	615	350	625	550	(1000 MT)
Feed Waste Dom. Cons.	400	350	400	250	450	400	(1000 MT)
Total Dom. Cons.	4,525	5,000	4,590	3,900	4,475	5,350	(1000 MT)
Ending Stocks	90	57	73	107	98	57	(1000 MT)
Total Distribution	5,674	5,847	5,090	4,457	5,073	6,107	(1000 MT)
CY Imports	0	0	0	0	0	0	(1000 MT)
CY Imp. from U.S.	0	0	0	0	0	0	(1000 MT)
CY Exports	876	725	475	656	500	600	(1000 MT)
CY Exp. to U.S.	0	0	0	0	0	0	(1000 MT)
TS=TD		0		0		0	

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

Meal, Peanut India	2011/2012		2012/2013		2013/2014		
	Market Year Begin: May 2011		Market Year Begin: May 2012		Market Year Begin: May 2013		
	USDA	New	USDA	New	USDA	New	



Crush	3,500	4,200	3,575	3,300	3,400	4,400	(1000 MT)
Extr. Rate, 999.9999	0.	0.3355	0.	0.34	0.	0.34	(PERCENT)
Beginning Stocks	50	49	21	81	10	142	(1000 MT)
Production	1,160	1,409	1,180	1,122	1,125	1,496	(1000 MT)
MY Imports	0	0	0	0	0	0	(1000 MT)
MY Imp. from U.S.	0	0	0	0	0	0	(1000 MT)
MY Imp. from EU	0	0	0	0	0	0	(1000 MT)
Total Supply	1,210	1,458	1,201	1,203	1,135	1,638	(1000 MT)
MY Exports	4	20	2	1	4	15	(1000 MT)
MY Exp. to EU	0	0	0	0	0	0	(1000 MT)
Industrial Dom. Cons.	10	10	10	10	0	10	(1000 MT)
Food Use Dom. Cons.	1,175	1,347	1,179	1,050	1,120	1,300	(1000 MT)
Feed Waste Dom. Cons.	0	0	0	0	0	0	(1000 MT)
Total Dom. Cons.	1,185	1,357	1,189	1,060	1,120	1,310	(1000 MT)
Ending Stocks	21	81	10	142	11	313	(1000 MT)
Total Distribution	1,210	1,458	1,201	1,203	1,135	1,638	(1000 MT)
CY Imports	0	0	0	0	0	0	(1000 MT)
CY Imp. from U.S.	0	0	0	0	0	0	(1000 MT)
CY Exports	6	0	3	0	4	0	(1000 MT)
CY Exp. to U.S.	0	0	0	0	0	0	(1000 MT)
TS=TD		0		0		0	

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

Oilseed, Sunflowerseed India	2011/2012		2012/2013		2013/2014		
	Market Year Begin: May 2011		Market Year Begin: May 2012		Market Year Begin: May 2013		
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post	
Area Planted	750	780	800	810	830	850	(1000 HA)
Area Harvested	735	770	800	810	830	755	(1000

							HA)
Beginning Stocks	0	0	0	0	0	0	(1000 MT)
Production	620	640	700	620	730	725	(1000 MT)
MY Imports	0	0	0	0	0	0	(1000 MT)
MY Imp. from U.S.	0	0	0	0	0	0	(1000 MT)
MY Imp. from EU	0	0	0	0	0	0	(1000 MT)
Total Supply	620	640	700	620	730	725	(1000 MT)
MY Exports	5	0	4	0	4	0	(1000 MT)
MY Exp. to EU	0	0	0	0	0	0	(1000 MT)
Crush	580	550	620	520	650	625	(1000 MT)
Food Use Dom. Cons.	0	0	0	0	0	0	(1000 MT)
Feed Waste Dom. Cons.	35	90	76	100	76	100	(1000 MT)
Total Dom. Cons.	615	640	696	620	726	725	(1000 MT)
Ending Stocks	0	0	0	0	0	0	(1000 MT)
Total Distribution	620	640	700	620	730	725	(1000 MT)
CY Imports	0	0	0	0	0	0	(1000 MT)
CY Imp. from U.S.	0	0	0	0	0	0	(1000 MT)
CY Exports	5	0	4	0	4	0	(1000 MT)
CY Exp. to U.S.	0	0	0	0	0	0	(1000 MT)
TS=TD		0		0		0	

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

Meal, Sunflowerseed India	2011/2012		2012/2013		2013/2014		
	Market Year Begin: May 2011		Market Year Begin: May 2012		Market Year Begin: May 2013		
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post	
Crush	580	550	620	520	650	625	(1000 MT)
Extr. Rate, 999.9999	0.	0.4818	0.	0.4808	0.	0.48	(PERCENT)
Beginning Stocks	0	0	0	0	0	0	(1000 MT)
Production	275	265	294	250	310	300	(1000 MT)
MY Imports	0	0	0	0	0	0	(1000 MT)
MY Imp. from U.S.	0	0	0	0	0	0	(1000 MT)
MY Imp. from EU	0	0	0	0	0	0	(1000 MT)
Total Supply	275	265	294	250	310	300	(1000 MT)
MY Exports	0	0	0	0	0	0	(1000 MT)
MY Exp. to EU	0	0	0	0	0	0	(1000 MT)
Industrial Dom. Cons.	0	0	0	0	0	0	(1000 MT)
Food Use Dom. Cons.	0	0	0	0	0	0	(1000 MT)
Feed Waste Dom. Cons.	275	265	294	250	310	300	(1000 MT)
Total Dom. Cons.	275	265	294	250	310	300	(1000 MT)
Ending Stocks	0	0	0	0	0	0	(1000 MT)
Total Distribution	275	265	294	250	310	300	(1000 MT)
CY Imports	0	0	0	0	0	0	(1000 MT)
CY Imp. from U.S.	0	0	0	0	0	0	(1000 MT)
CY Exports	0	0	0	0	0	0	(1000 MT)
CY Exp. to U.S.	0	0	0	0	0	0	(1000 MT)
SME	260	250	278	236	293	283	(1000 MT)
TS=TD		0		0		0	

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

Oil, Sunflowerseed India	2011/2012		2012/2013		2013/2014		
	Market Year Begin: Oct 2011		Market Year Begin: Oct 2012		Market Year Begin: Oct 2013		
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post	
Crush	580	550	620	520	650	625	(1000 MT)
Extr. Rate, 999.9999	0.	0.361 8	0.	0.361 5	0.	0.361 6	(PERCENT)
Beginning Stocks	100	231	137	444	125	432	(1000 MT)
Production	205	199	220	188	231	226	(1000 MT)
MY Imports	1,114	1,114	1,150	1,100	1,225	1,250	(1000 MT)
MY Imp. from U.S.	0	0	0	0	0	0	(1000 MT)
MY Imp. from EU	0	0	0	0	0	0	(1000 MT)
Total Supply	1,419	1,544	1,507	1,732	1,581	1,908	(1000 MT)
MY Exports	2	0	2	0	2	0	(1000 MT)
MY Exp. to EU	0	0	0	0	0	0	(1000 MT)
Industrial Dom. Cons.	0	0	0	0	0	0	(1000 MT)
Food Use Dom. Cons.	1,280	1,100	1,380	1,300	1,475	1,500	(1000 MT)
Feed Waste Dom. Cons.	0	0	0	0	0	0	(1000 MT)
Total Dom. Cons.	1,280	1,100	1,380	1,300	1,475	1,500	(1000 MT)
Ending Stocks	137	444	125	432	104	408	(1000 MT)
Total Distribution	1,419	1,544	1,507	1,732	1,581	1,908	(1000 MT)
CY Imports	1,079	871	1,200	750	1,225	750	(1000 MT)
CY Imp. from U.S.	0	0	0	0	0	0	(1000 MT)
CY Exports	0	0	0	0	0	0	(1000 MT)
CY Exp. to U.S.	0	0	0	0	0	0	(1000 MT)
TS=TD		0		0		0	



CY Exp. to U.S.	0	0	0	0	0	0	(1000 MT)
TS=TD		0		0		0	

<sup>[1]</sup> Normal area planted to soybean is 9.2 million hectares. Normal area is average of 5 years starting 2006-07 to 2010-11

<sup>[2]</sup> which excludes rice bran and castor meal