



Profit through Knowledge

**Presentation on  
“Rapeseed Complex In India”  
“Production, Demand & Supply Scenario”**

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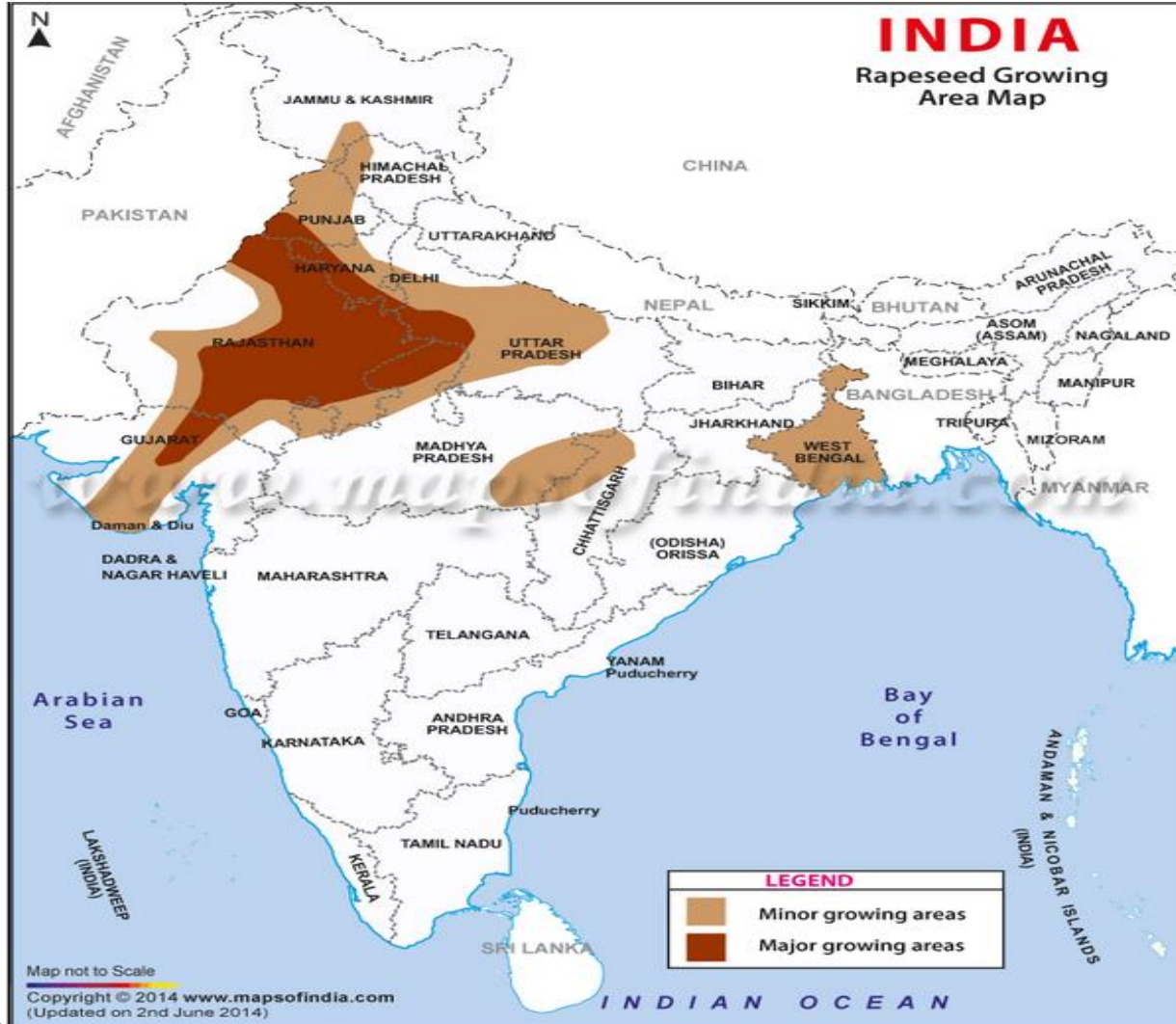
**GGN International  
G. G. Patel & Nikhil Research Company**

**At  
SEA RAPESEED-MUSTARD CONCLAVE 2018  
JAIPUR**

**On 8<sup>th</sup> July, 2018**



# Rapeseed Growing Area Map of India

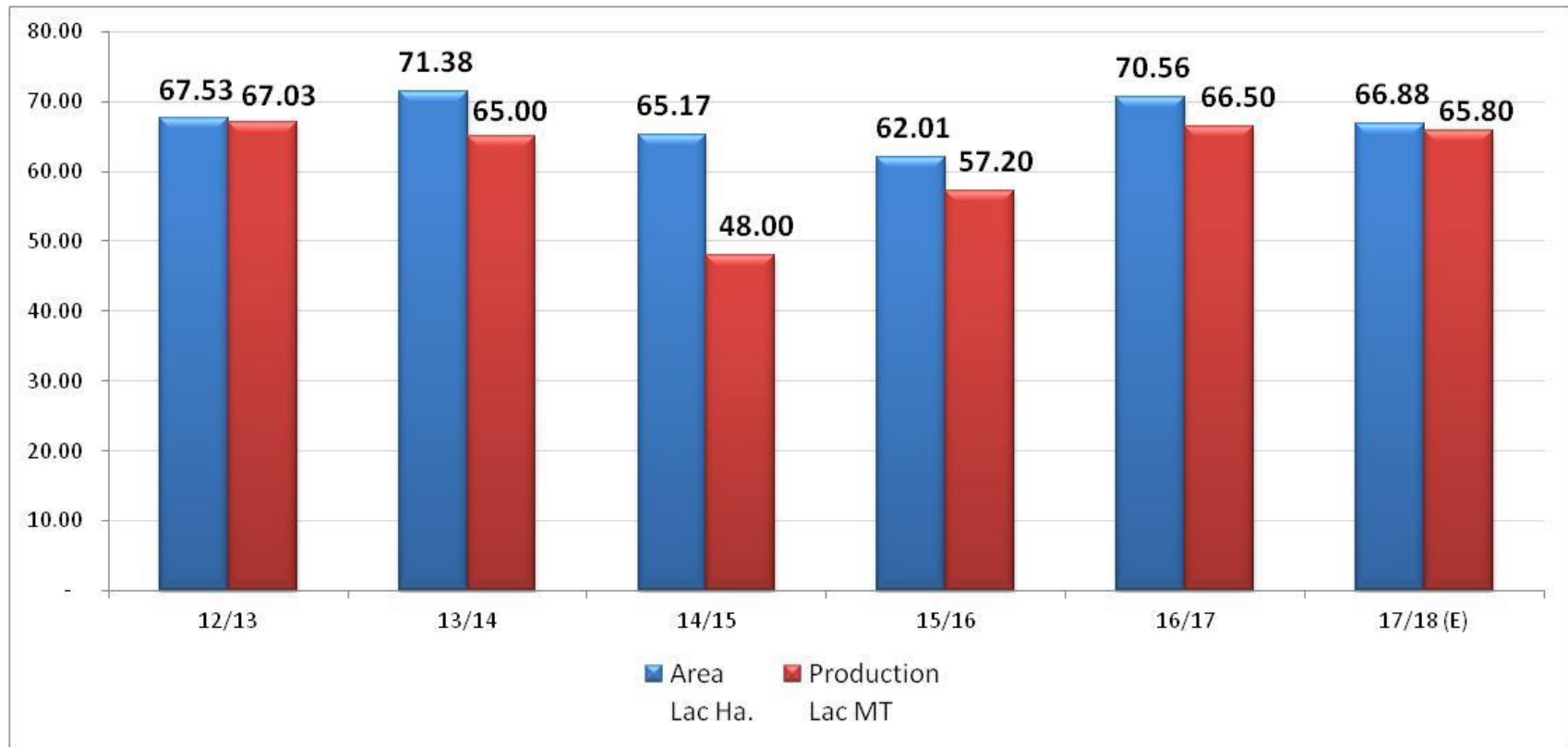


## Main Rapeseed Producing States

- Rajasthan
- U.P.
- M.P. & Chhattisgarh
- Haryana
- West Bengal
- Gujarat



# Rapeseed Area & Production in India



Above production include Rabi & Kharif (Torja)

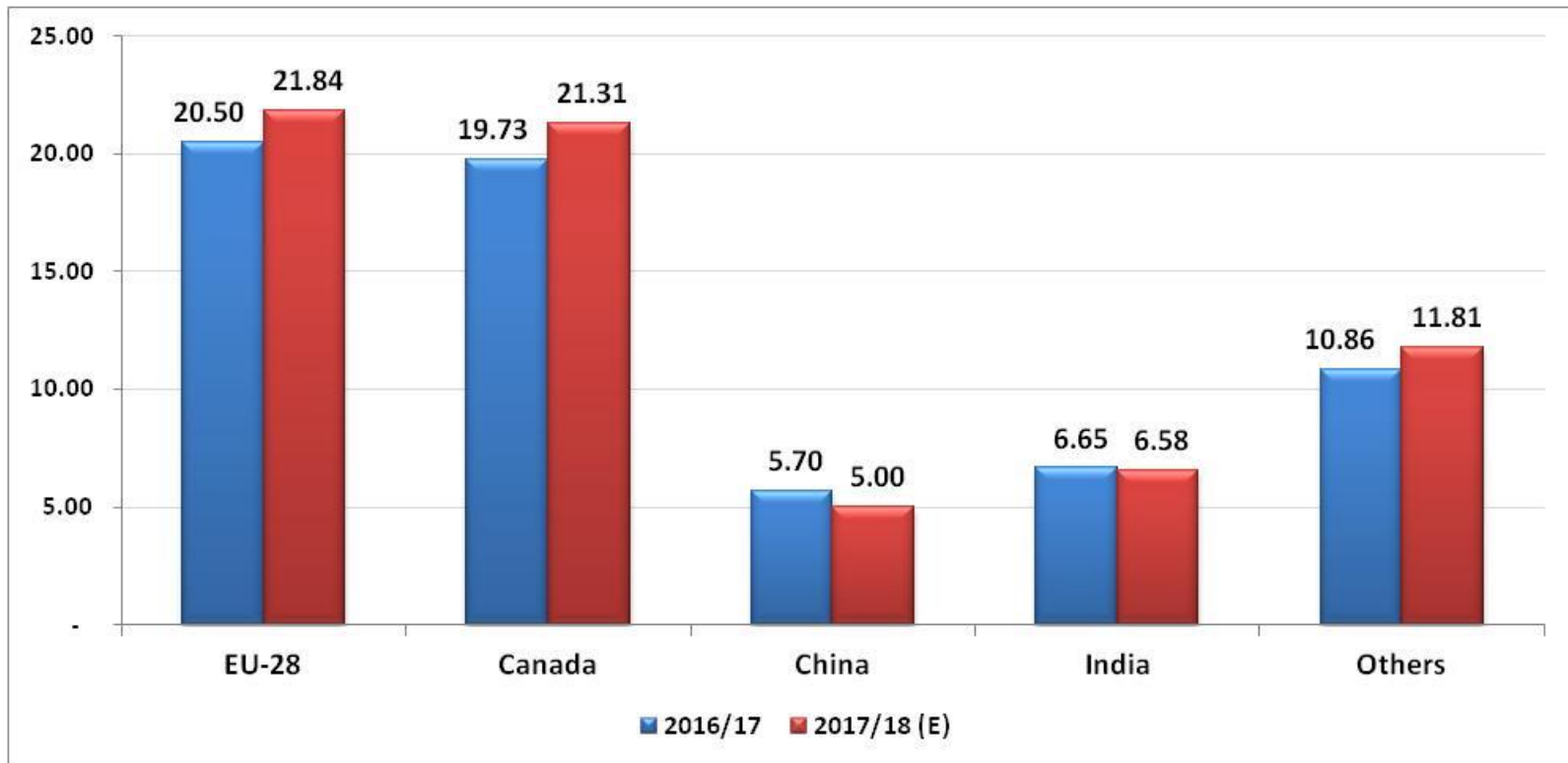


## Rapeseed Crop Estimate for 2017-18

State	Area (Lac Ha)	Production (Lac MT)	Yield (Kg/ Ha.)
Uttar Pradesh	12.13	10.50	866
Rajasthan	20.89	24.00	1,149
Punjab/Haryana	6.29	7.50	1,192
Gujarat	2.22	3.05	1,374
M.P.	7.58	6.75	891
West Bengal	6.21	4.25	684
Eastern India & Others	11.56	8.25	714
<b>Sub Total</b>	<b>66.88</b>	<b>64.30</b>	<b>961</b>
Taramira	Incl. in above	0.50	
<b>Sub Total</b>		<b>64.80</b>	
Kharif Toria	Incl. in above	1.00	
<b>TOTAL</b>	<b>66.88</b>	<b>65.80</b>	<b>984</b>



## World Rapeseed Production in 2016/17 & 2017/18 (in ml. T)

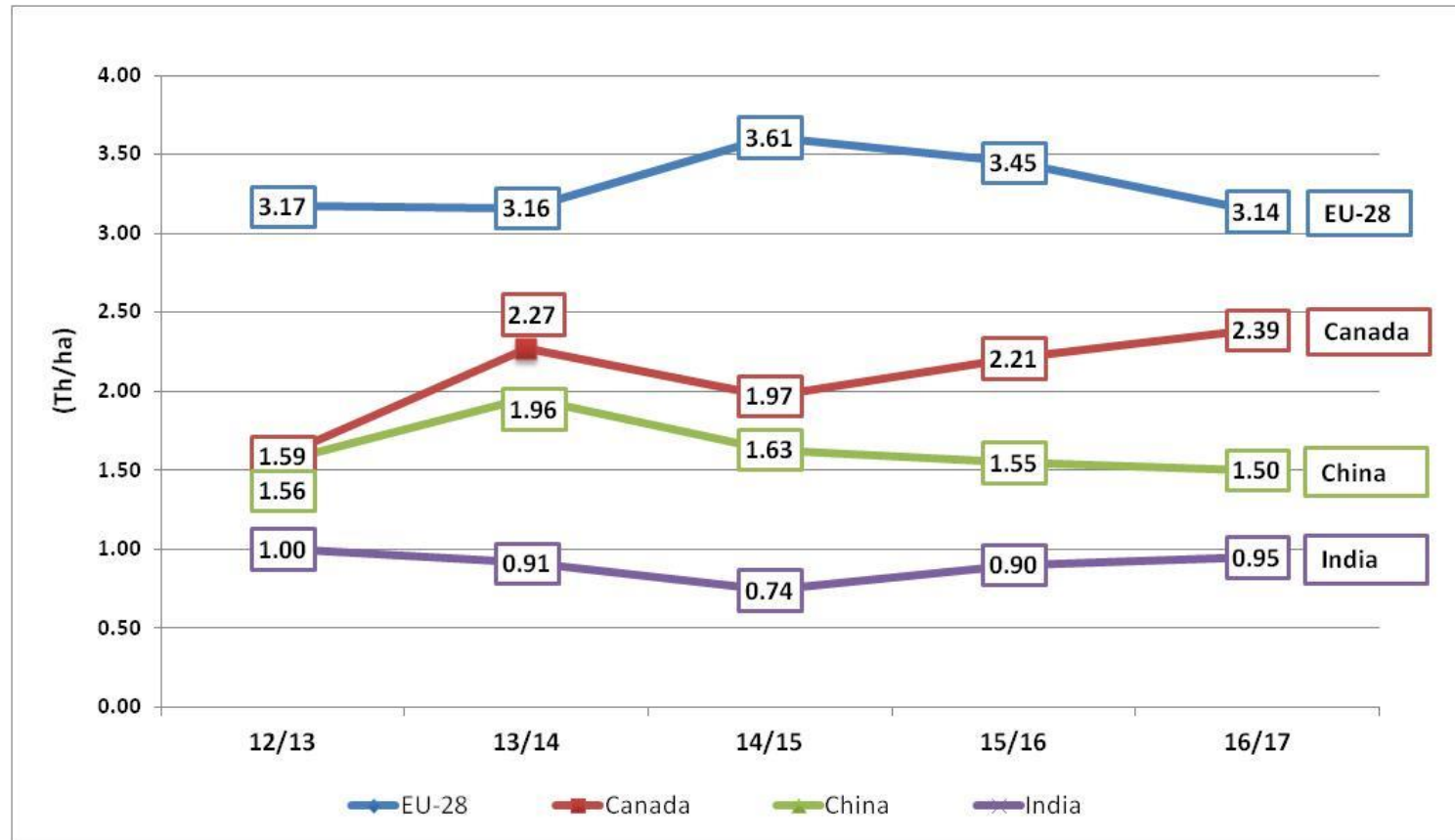


**World total production was 63.44ml T in 2016/17 and 66.54 ml T expected in 2017/18.**

**India produces around 10 % of World Production.**



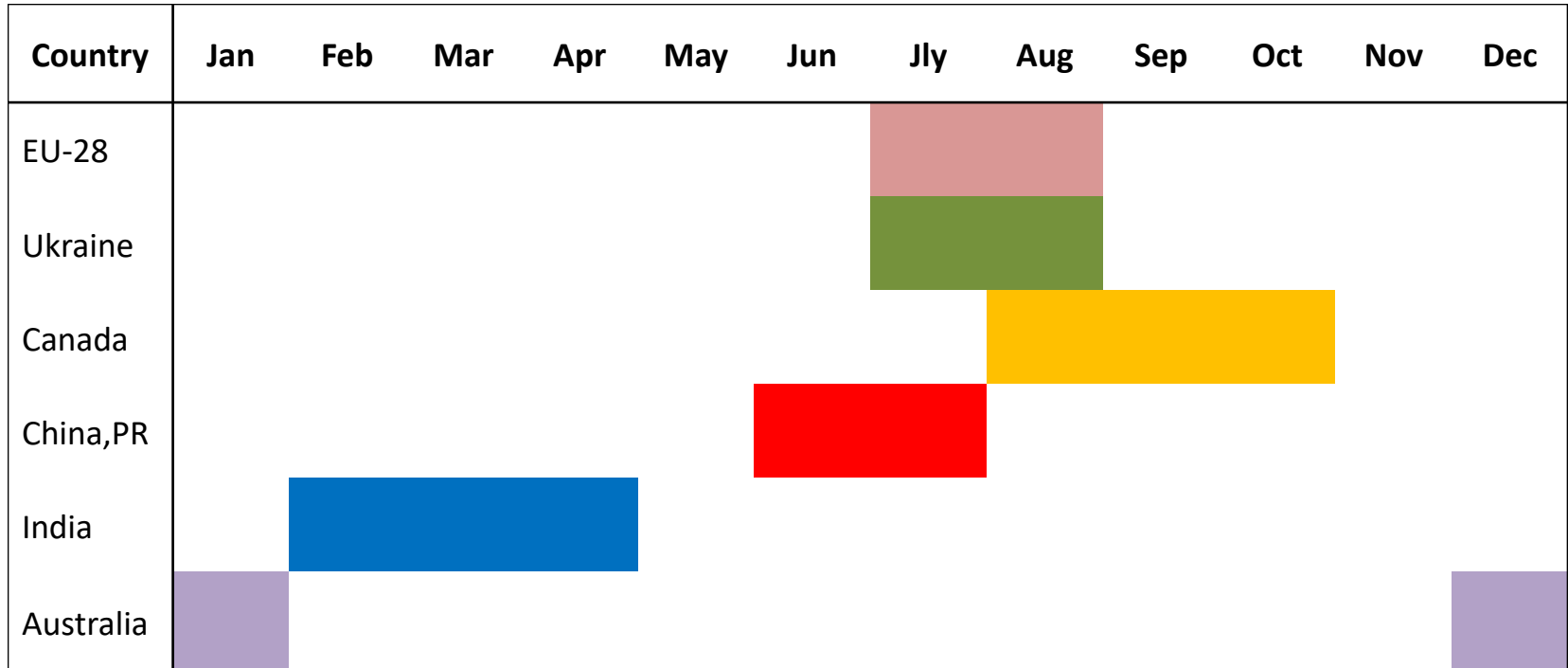
## World Rapeseed Yield From 2012/13 & 2016/17 (in T/Ha)



**Indian Rapeseed yield per Ha is only 28% of EU, 44% of Canada And 54% of China.**



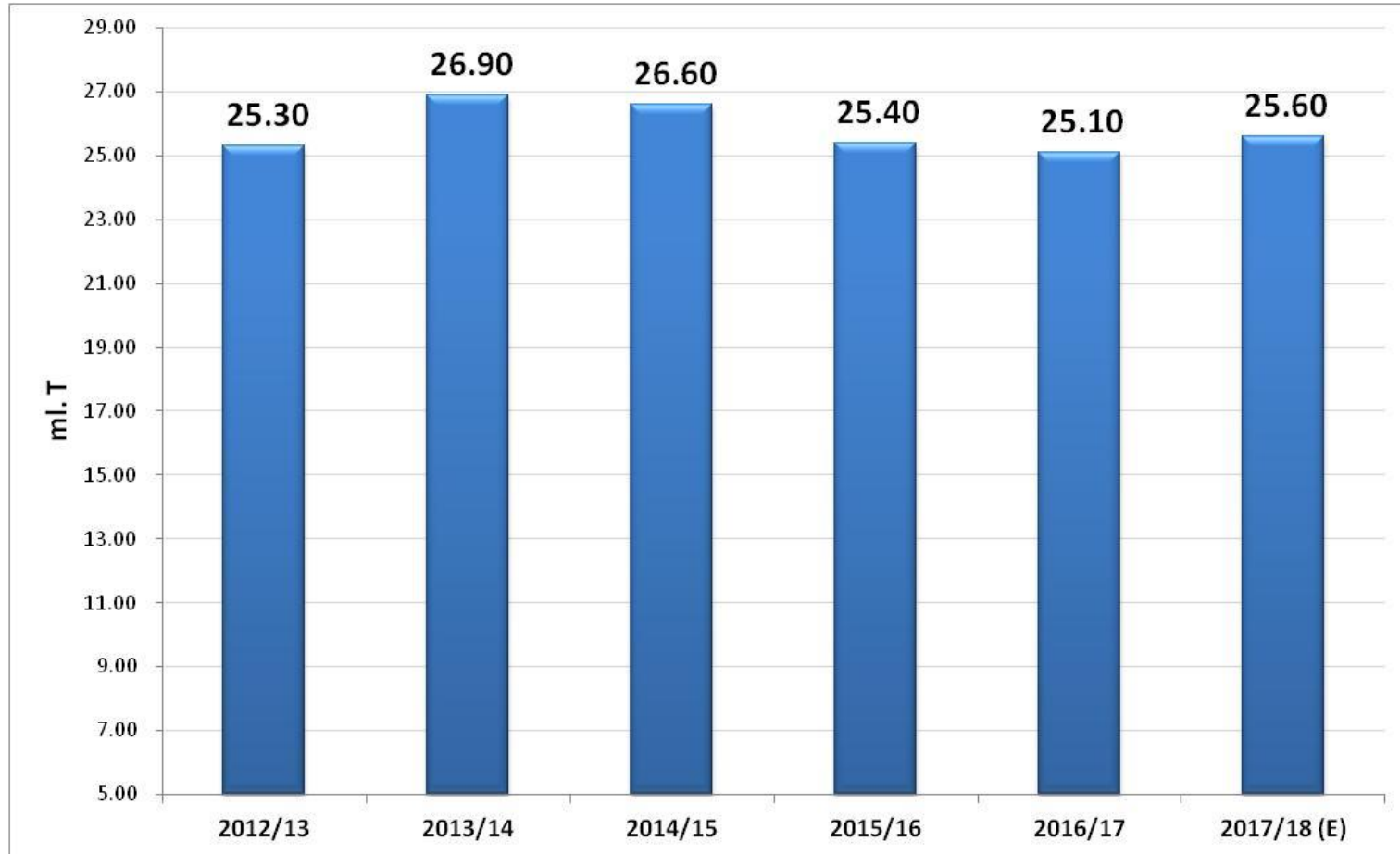
# World Rapeseed Harvesting Period



- **EU-28 & Ukraine crop is harvested during July-August.**
- **Canada crop is harvested during August-October.**
- **China crop is harvested during June-July.**
- **India crop is harvested during February-April.**
- **Australia crop is harvested during December-January.**



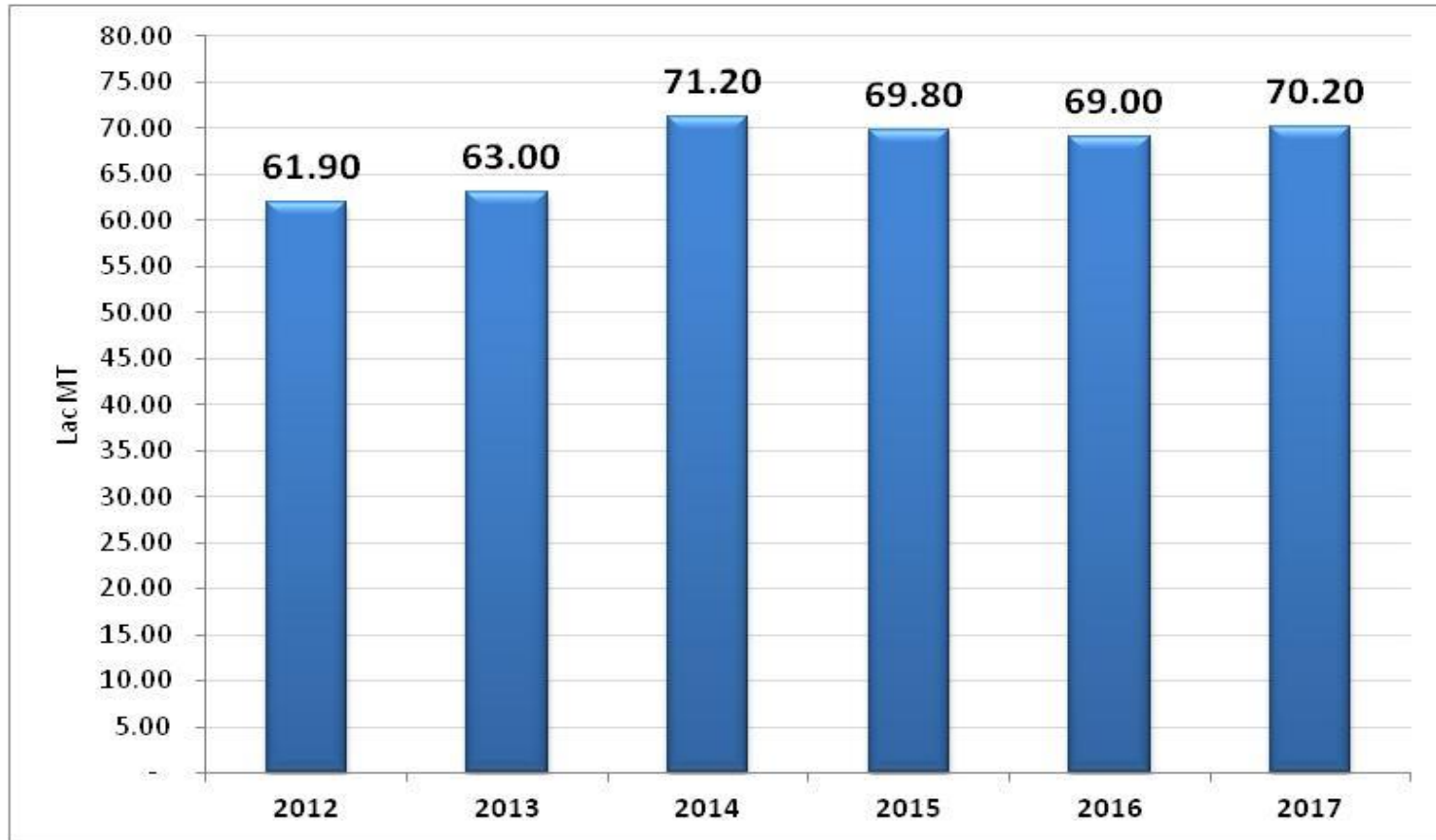
## World Rapeseed Oil Production (ml T)







## World Rapeseed Oil Use for Biodiesel Production (Lac MT)





## Rapeseed Oil Domestic Production And Import in India (Nov-Oct)

Year	Domestic Production (Lac MT)	Import (Lac MT)	Total (Lac MT)
2012/13	20.50	0.28	<b>20.78</b>
2013/14	21.50	2.03	<b>23.53</b>
2014/15	16.80	3.55	<b>20.35</b>
2015/16	16.35	3.79	<b>20.14</b>
2016/17	19.00	2.90	<b>21.90</b>
2017/18 (E)	22.40	2.60	<b>25.00</b>

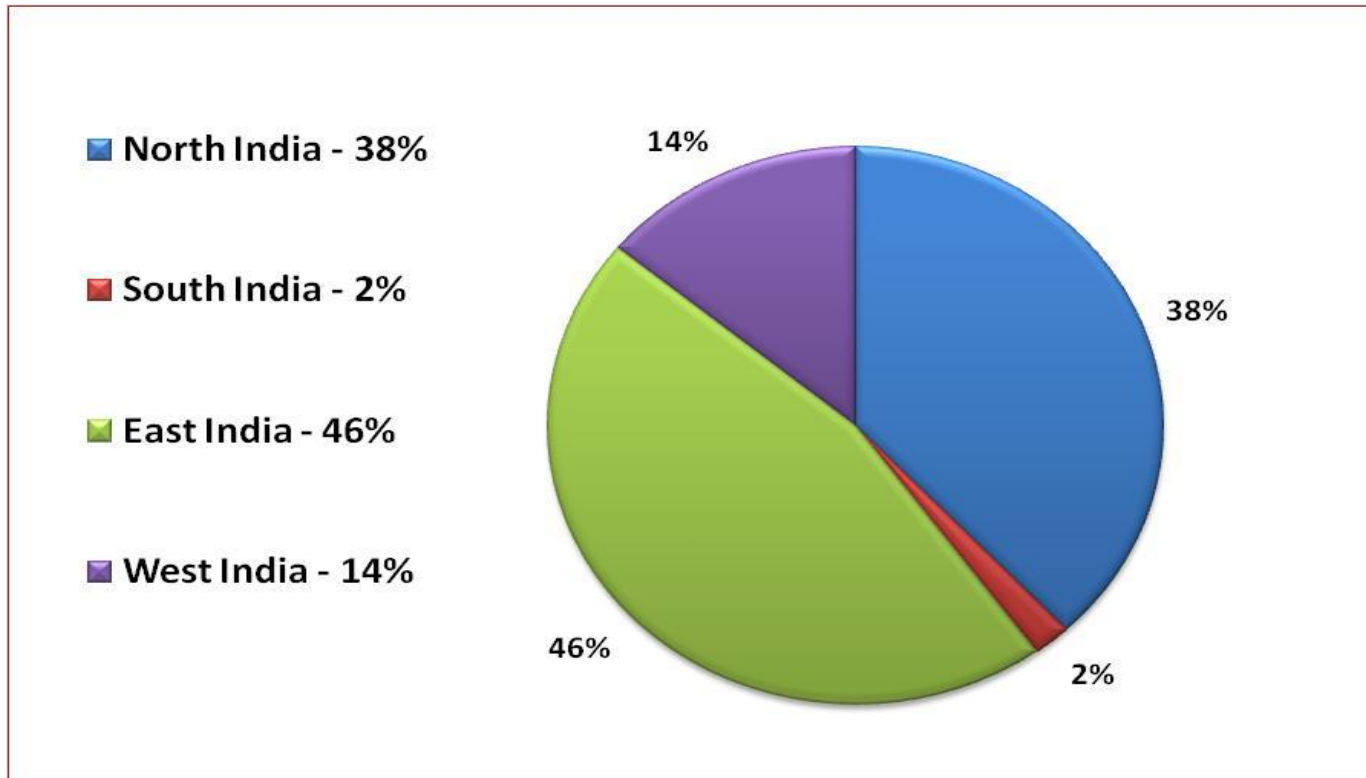


## Rapeseed Oil Consumption in India (Domestic + Imported) (Nov-Oct)

Year	Rapeseed Oil Consumption	
	Lac MT	% of TTL Consump.
2012/13	20.50	11.9%
2013/14	23.60	12.9%
2014/15	20.35	10.1%
2015/16	19.90	9.6%
2016/17	21.50	9.9%
2017/18 (E)	25.80	11.4%



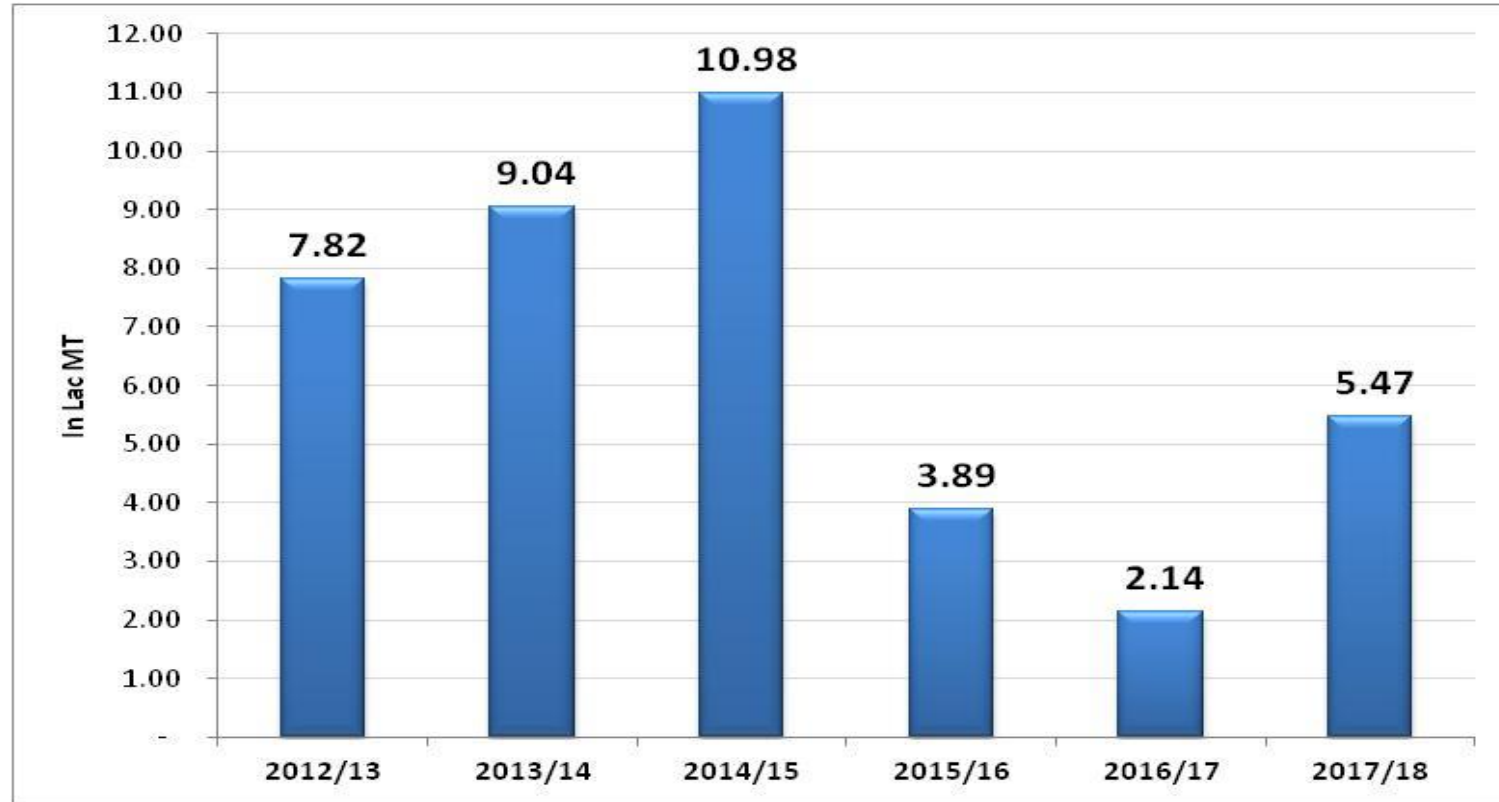
## Zone-wise Rapeseed Oil Consumption Pattern of India in 2014/15



**Total Consumption of Rapeseed oil in India was 20.35 Lac MT in 2014/15. Out of which Rapeseed oil consumption is highest in East India & North India with percentage of 46% & 38% respectively.**



## Rapeseed Meal Export From India From 2012/13 to 2017/18 (Mar-Feb) (Lac MT)



**Export of Rapeseed Meal decreased by 2.35 Lac T in last six years i.e. average decrease 5% per year. In last six years Highest export was 10.98 Lac T in 2014/15 and lowest export was 2.14 Lac T in 2016/17**



# Monthly Rapeseed Arrival During 2012-13 to 2017-18

(Figures in Lac MT)

Month	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	Average Monthly %
Mar	11.15	7.93	10.00	7.47	12.10	12.00	17.7%
Apr	8.00	14.10	14.15	10.07	11.45	10.40	19.9%
May	6.15	7.95	7.80	6.04	6.30	6.65	11.9%
Jun	3.75	5.00	5.25	3.84	3.90	4.50	7.6%
Jul	3.19	2.95	4.30	2.90	2.70	3.85	5.8%
Aug	2.75	2.60	2.80	2.67	2.00	3.80	4.8%
Sep	2.80	3.07	3.00	3.10	2.05	3.60	5.1%
Oct	2.30	4.65	3.10	2.72	2.30	3.15	5.3%
Nov	2.71	3.50	3.75	2.27	2.95	4.25	5.7%
Dec	2.70	3.05	3.40	2.17	2.85	4.15	5.3%
Jan	2.50	2.63	2.70	1.52	2.15	2.75	4.2%
Feb	4.00	4.77	4.00	3.10	2.80	4.25	6.7%
<b>Total Arrival</b>	<b>52.00</b>	<b>62.20</b>	<b>64.25</b>	<b>47.87</b>	<b>53.55</b>	<b>63.35</b>	<b>100.0%</b>

50%

18%

16%

16%



# Monthly Rapeseed Crush During 2012-13 to 2017-18

(Figures in Lac MT)

Month	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	Average Monthly %
Mar	5.50	5.80	7.50	5.50	6.50	6.00	<b>10.9%</b>
Apr	5.50	8.00	9.00	7.30	7.50	7.00	<b>13.1%</b>
May	5.50	7.00	8.00	5.00	5.25	6.25	<b>11.0%</b>
Jun	4.50	6.00	6.00	4.00	4.75	5.75	<b>9.2%</b>
Jul	4.00	5.30	5.00	3.00	4.25	5.50	<b>8.0%</b>
Aug	4.00	4.50	4.20	3.25	4.20	4.50	<b>7.3%</b>
Sep	4.00	4.50	5.00	3.10	4.00	4.50	<b>7.5%</b>
Oct	4.50	4.80	4.00	3.20	3.75	4.50	<b>7.3%</b>
Nov	4.00	4.50	4.30	2.80	2.50	5.00	<b>6.9%</b>
Dec	3.75	4.00	4.10	2.50	2.50	4.25	<b>6.3%</b>
Jan	3.50	3.50	2.70	2.10	2.50	3.25	<b>5.2%</b>
Feb	3.25	4.75	4.75	4.25	3.50	4.00	<b>7.3%</b>
<b>Total Crush</b>	<b>52.00</b>	<b>62.65</b>	<b>64.55</b>	<b>46.00</b>	<b>51.20</b>	<b>60.50</b>	<b>100.00%</b>

35%

25%

22%

18%



# Monthly Average Prices of Jaipur Kachi Ghani Rapeseed Oil and Indore Refined Soybean Oil And Spread Between Two Oils

(Rs/10 Kg.)

Month	2014-15			2015-16			2016-17			2017-18		
	Kachi Ghani Jaipur	SBOR Indore	K.Ghani (-) SBOR	Kachi Ghani Jaipur	SBOR Indore	K.Ghani (-) SBOR	Kachi Ghani Jaipur	SBOR Indore	K.Ghani (-) SBOR	Kachi Ghani Jaipur	SBOR Indore	K.Ghani (-) SBOR
Mar	697	688	9	704	598	106	755	615	140	739	658	81
Apr	670	685	-15	729	602	127	828	649	179	731	629	102
May	677	681	-4	817	606	211	827	635	192	716	626	90
<b>Qtr Avg.</b>	<b>681</b>	<b>685</b>	<b>-3</b>	<b>750</b>	<b>602</b>	<b>148</b>	<b>803</b>	<b>633</b>	<b>170</b>	<b>729</b>	<b>638</b>	<b>91</b>
Jun	678	659	19	877	611	266	854	637	217	702	627	75
July	718	654	64	884	595	289	925	598	327	749	637	112
Aug	727	619	108	882	581	301	942	635	307	783	646	137
<b>Qtr Avg.</b>	<b>708</b>	<b>644</b>	<b>64</b>	<b>881</b>	<b>596</b>	<b>285</b>	<b>907</b>	<b>623</b>	<b>284</b>	<b>745</b>	<b>637</b>	<b>108</b>
Sep	736	601	135	907	579	328	913	648	265	791	664	127
Oct	728	605	123	1054	627	427	876	656	220	781	665	116
Nov	735	585	150	1032	614	418	866	686	180	804	701	103
<b>Qtr Avg.</b>	<b>733</b>	<b>597</b>	<b>136</b>	<b>998</b>	<b>607</b>	<b>391</b>	<b>885</b>	<b>663</b>	<b>222</b>	<b>792</b>	<b>677</b>	<b>115</b>
Dec	785	598	187	947	630	317	859	726	133	809	715	94
Jan	799	662	137	844	613	231	826	728	98	788	735	53
Feb	740	621	119	793	616	177	774	689	85	790	738	52
<b>Qtr Avg.</b>	<b>775</b>	<b>627</b>	<b>148</b>	<b>861</b>	<b>620</b>	<b>242</b>	<b>820</b>	<b>714</b>	<b>106</b>	<b>796</b>	<b>729</b>	<b>66</b>
<b>Yearly Avg.</b>	<b>724</b>	<b>638</b>	<b>86</b>	<b>873</b>	<b>606</b>	<b>267</b>	<b>854</b>	<b>655</b>	<b>199</b>	<b>765</b>	<b>670</b>	<b>95</b>





# Monthly Average Prices Rapeseed Oil and Soybean Oil CIF Kandla for Nearby Shipment And Spread Between Two Oils

(\$/T)

Month	2016-17			2017-18		
	Rapeseed Oil \$/T	Soybean Oil \$/T	Rapeseed Oil (-) Soybean Oil	Rapeseed Oil \$/T	Soybean Oil \$/T	Rapeseed Oil (-) Soybean Oil
Mar	733	751	-18	807	767	40
Apr	801	788	13	799	756	43
May	790	776	14	810	794	16
<b>Qtr Avg.</b>	<b>775</b>	<b>772</b>	<b>3</b>	<b>805</b>	<b>772</b>	<b>33</b>
Jun	778	768	10	796	798	-2
July	758	751	7	807	801	6
Aug	789	806	-17	831	816	15
<b>Qtr Avg.</b>	<b>775</b>	<b>775</b>	<b>-</b>	<b>811</b>	<b>805</b>	<b>6</b>
Sep	797	801	-4	865	834	31
Oct	823	827	-4	853	829	24
Nov	855	841	14	866	839	27
<b>Qtr Avg.</b>	<b>825</b>	<b>823</b>	<b>2</b>	<b>861</b>	<b>834</b>	<b>27</b>
Dec	897	885	12	850	812	38
Jan	880	856	24	852	821	31
Feb	847	808	39	841	810	31
<b>Qtr Avg.</b>	<b>875</b>	<b>850</b>	<b>25</b>	<b>848</b>	<b>814</b>	<b>33</b>
<b>Yearly Avg.</b>	<b>812</b>	<b>805</b>	<b>7</b>	<b>831</b>	<b>806</b>	<b>25</b>



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## NAFED Procurement of Rapeseed From Farmers During 2017/18 Rabi Season (Upto 30 June 2018)

State	Qty Lac MT
Rajasthan	4.70
Haryana	2.30
M.P.	1.20
Gujarat	0.50
U.P.	0.01
<b>TOTAL</b>	<b>8.71</b>

Month-wise Purchase	
Month	Qty Lac MT
April	2.50
May	3.86
June	2.35
<b>TOTAL</b>	<b>8.71</b>

**NAFED purchased Rapeseed from farmers on MSP of  
Rs.3900 + Bonus Rs.100 = Rs.4000 per qtl.**



## Rapeseed Arrival & Crush During Current Season (Lac MT)

(Lac MT)

Month	Arrival (Except Nafed)	Crushing
16-28 Feb'18	2.25	2.25
Mar'18	12.60	6.20
Apr'18	11.00	9.00
May'18	8.35	8.00
Jun'18	5.60	7.00
<b>TOTAL</b>	<b>39.80</b>	<b>32.45</b>

Details Upto 30.06.18 (Lac MT)	
Arrival (Except Nafed)	39.80
Less : Crush	32.45
Less : Direct Use/Export	1.20
Stock With Farmers, Processors & Stockist	30.40

B/S for Remaining Period of the Season (Lac MT)	
Stock With Farmers, Processors & Stockist	30.40
Stock with Nafed	8.71
<b>Total Available as on 01.07.18</b>	<b>39.11</b>
Less : Carry-forward for Next Season	5.00
<b>Available for Crushing</b>	<b>34.11</b>

**Average per month available for crushing for remaining 8.5 months of the season 4.00 Lac MT/month (Last year 4.10 Lac MT/month).**



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